

# ProjectDox New Features 8.3 to 9.1

## End-user

Howard County  
Mara Fitter - Instructor  
6/18/2019

**Start Recording**



# Overview

- Navigation
- Reports
- Viewer Updates
- HMTL Enhancements
- Workflow
- Improved Applicant Experience

# Navigation

# New Home Page – Projects Tab

**ProjectDox**

Home All Tasks Profile Logout

Tasks **Projects**

All Projects Refresh Save Settings Recent Projects All Projects

Show 8 records

PROJECT	OPTIONS	DESCRIPTION	OWNER	STATUS	CREATE DATE
Contains...		Contains...	Contains...	Contains...	On...
<a href="#">BU-2018-001</a>		BIC Applicant Training	<a href="#">Wally Taylor</a>	Applicant Upload	4/11/2018 10:11:34 AM
<a href="#">BU-2018-07-19 005</a>		Enterprise High Rise	<a href="#">Wally Taylor</a>	Applicant Upload	8/15/2018 12:24:01 PM
<a href="#">BU-2018-07-19 015</a>		Enterprise High Rise	<a href="#">Wally Taylor</a>	Applicant Upload	8/8/2018 7:18:31 PM
<a href="#">zMaWa Reassignment Test</a>		Testing	<a href="#">Wally Taylor</a>	Applicant Upload	4/23/2018 1:07:40 PM

1 - 4 of 4 records

prev 1 next

# New Home Page – Tasks Tab

The screenshot shows the ProjectDox application interface. At the top, the 'ProjectDox' logo is on the left, and navigation links 'Home', 'All Tasks', 'Profile', and 'Logout' are on the right. The 'Home' link is highlighted with a blue box. Below the navigation bar, there are two tabs: 'Tasks' and 'Projects'. The 'Tasks' tab is selected and highlighted with a blue box. Under the 'Tasks' tab, there are links for 'Refresh', 'Save Settings', and a 'Quick Filter' dropdown set to 'Prescreen'. The main area displays a table of tasks. The table has columns: OPTIONS, TASK, PROJECT, INSTANCE, GROUP, ASSIGNM..., STATUS, PRIORITY, DUE DATE, and CREATED. Each column has a dropdown arrow. The table contains three rows of task data. At the bottom of the table, it says '1 - 3 of 3 records' and there are pagination controls.

OPTIONS	TASK	PROJECT	INSTANCE	GROUP	ASSIGNM...	STATUS	PRIORITY	DUE DATE	CREATED
	<a href="#">Applicant Upload Task</a>	<a href="#">BU-2018-001</a>	MaWa	Applicant	FirstInGroup	Pending	Medium		4/11/2018 10:11:52 AM
	<a href="#">Applicant Upload Task</a>	<a href="#">zMaWa Reassignment Test</a>	zMaWa Reassignment Test - PF_BIC_Building_L - 4/23/2018 1:07:40 PM	Applicant	FirstInGroup	Pending	Medium		7/24/2018 11:08:37 AM
	<a href="#">Applicant Upload Task</a>	<a href="#">BU-2018-07-19 005</a>	BU-2018-07-19 005 - Building Plan Check Review - 8/15/2018 12:24:37 PM	Applicant	FirstInGroup	Accepted	Medium		8/17/2018 11:08:36 AM

1 - 3 of 3 records

# Tasks (PD) Tab - Dual Workflow Sites

<div> <div>Tasks (PF)</div> <div><b>Tasks (PD)</b></div> <div>Projects</div> </div>									
Project Name	Task	Attached To	Status	Priority	Due date	Assigned On	Updated On	Updated By	Description
15RMS0026	<a href="#">ReviewQA</a>	Review Coordinator	Pending			6/10/2015 11:52:41 AM	6/10/2015 11:52:41 AM		RELO - Expert Resou
15RMS0026 Copy1	<a href="#">ReviewQA</a>	Review Coordinator	Pending			5/29/2015 3:51:10 PM	5/29/2015 3:51:10 PM		Training
zTESTBR001 Copy 2 for TRAINING	<a href="#">DepartmentReview</a>	Review Coordinator	Accepted			5/28/2015 11:20:33 AM	5/29/2015 8:45:46 AM		.com Training
15M5031	<a href="#">DepartmentReview</a>		Accepted			5/6/2015 2:07:52 PM	6/1/2015 5:25:26 PM		.com MSU - Test P
15M5031	<a href="#">DepartmentReview</a>		Accepted			5/6/2015 2:07:52 PM	6/1/2015 5:23:21 PM		.com MSU - Test P
15M5031	<a href="#">DepartmentReview</a>		Accepted			5/6/2015 2:07:52 PM	5/6/2015 3:55:15 PM		.com MSU - Test P
15M5031-Training	<a href="#">DepartmentReview</a>		Accepted			5/6/2015 9:31:13 AM	5/6/2015 9:31:50 AM		.com training - SHOW TAS
ISG-Training only	<a href="#">BeginReview</a>	Intake	Accepted			5/5/2015 11:08:35 PM	5/6/2015 9:25:06 AM		.com TRAINING ONLY, PLE
15M5031-Training	<a href="#">DepartmentReview</a>	Permits	Accepted			5/5/2015 5:07:26 PM	5/5/2015 5:07:41 PM		.com training - SHOW TAS
15M5031-Training	<a href="#">DepartmentReview</a>	Design Review	Accepted			5/5/2015 5:07:25 PM	5/5/2015 5:08:06 PM		.com training - SHOW TAS

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Page

# Main Navigation Buttons - Old



# Main Navigation Buttons - New



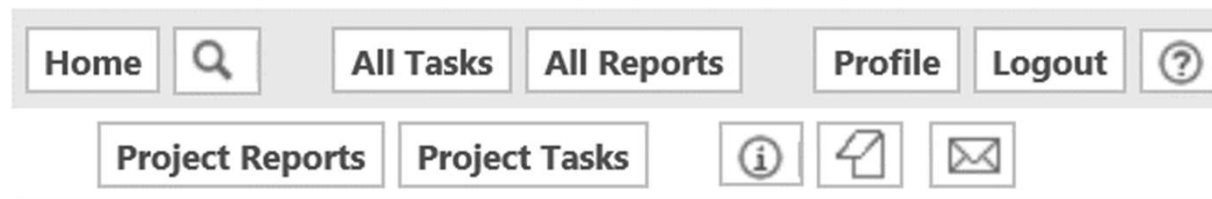
9.X Back, Forward, Refresh are now performed using browser or other controls. Home – to Home page with Tasks and Projects tabs.  
All Tasks – New window with global task list.



# In-project Navigation Buttons - Old



# In-project Navigation Buttons - New



# In-project Navigation Buttons - Changes

Old Name	New Name
Projects	Home
Site-wide Reports	All Reports
Workflow Portals	Project Tasks

# Navigation Shortcuts

Keyboard Combination	Action
Ctrl + plus (+) or Ctrl + minus (-)	Zoom in or zoom out
Ctrl + scroll wheel	Zoom in or out
Alt + Left arrow	Back
Alt + Right arrow	Forward
Alt + Tab	Task Switcher
F5	Refresh active window

# Grid View Configuration

Tasks

Projects

Refresh

Save Settings

Options	Task	Project	Instance	Group	Assignment Type	Priority	Status	Due Date	Created
	Contains...	Contains...	Contains...	Contains...	Contains...	Contains...	Contains...	Contains...	On...
<div><div></div><div></div></div>	<a href="#">Applicant Upload Task</a>	<a href="#">zMaWa Reassignment Test</a>	zMaWa Reassignment Test - PF BIC Building LAB - 4/23/2018 1:07:40 PM	Applicant	FirstInGroup	<div><div></div>Medium</div>	Pending		4/23/2018 1:18:24 PM
<div><div></div><div></div></div>	<a href="#">Assign Reviewers Task</a>	<a href="#">zMaWa 001</a>	zMaWa 001 - PF BIC Building LAB - 4/20/2018 4:54:07 PM	Review Coordinator	FirstInGroup	<div><div></div>Medium</div>	Accepted		4/24/2018 8:04:57 AM
<div><div></div><div></div></div>	<a href="#">Review Complete Task</a>	<a href="#">BU-2018-PA Mara</a>	BU-2018-PA Mara - Building Plan Check Review - 4/25/2018 11:56:45 AM	Review Coordinator	FirstInGroup	<div><div></div>Medium</div>	Pending		4/25/2018 12:16:57 PM
<div><div></div><div></div></div>	<a href="#">Mechanical Department Review cycle #1</a>	<a href="#">BU-2018-PA Wally</a>	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Mechanical	FirstInGroup	<div><div></div>Low</div>	Pending	5/4/2018 11:51:00 AM	4/25/2018 12:02:22 PM
<div><div></div><div></div></div>	<a href="#">Electrical Department Review cycle #1</a>	<a href="#">BU-2018-PA Wally</a>	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Electrical	FirstInGroup	<div><div></div>Low</div>	Pending	5/4/2018 11:51:00 AM	4/25/2018 12:02:22 PM
<div><div></div><div></div></div>	<a href="#">Plumbing Department Review cycle #1</a>	<a href="#">BU-2018-PA Wally</a>	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Plumbing	Individual	<div><div></div>Low</div>	Pending	5/4/2018 11:51:00 AM	4/25/2018 12:02:22 PM
<div><div></div><div></div></div>	<a href="#">Electrical Department Review cycle #1</a>	<a href="#">Test for Reassign</a>	Test for Reassign - BIC Building - Demo - 4/23/2018 3:06:10 PM	Electrical	FirstInGroup	<div><div></div>Low</div>	Accepted		4/23/2018 3:27:22 PM
<div><div></div><div></div></div>	<a href="#">Mechanical Department Review cycle #1</a>	<a href="#">Test for Reassign</a>	Test for Reassign - BIC Building - Demo - 4/23/2018 3:06:10 PM	Mechanical	Individual	<div><div></div>Low</div>	Accepted		4/23/2018 3:27:22 PM

1 - 8 of 8 records

prev

1

next

9.X New configurable Tasks and Projects grids. Users can move, hide, sort, and filter to display the items they wish to view. Grid layouts and configurations can be saved.

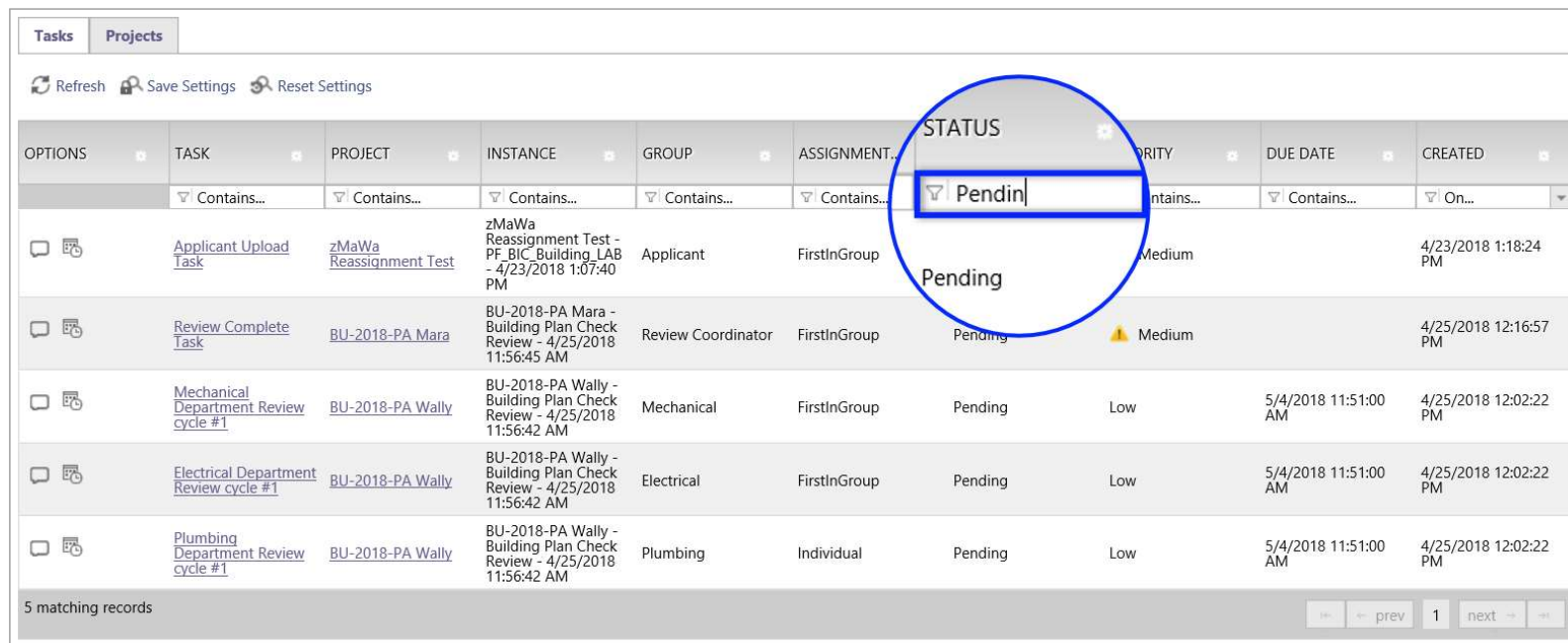
# Column Filter

- Click filter icon and select criterion from dropdown.






	PROJECT	INSTANCE	GROUP	PRIOR
Contains...	Contains...	Contains...	Contains...	Contains...
Reviewers Task	Test for Reassign	Test for Reassign - BIC Building - Demo - 4/23/2018 3:06:10 PM	Review C	...
Complete Task	zTraining for Mara - Plan Reviewers	zTraining for Mara - Plan Reviewers - Building Plan Check Review - 5/18/2018 5:35:08 AM	Review r	...
nt Upload Task	zMaWa Reassignment Test	zMaWa Reassignment Test - PF_BIC_Building_LAB - 4/23/2018 1:07:40 PM	Applicant	...
Review Task	BU-2018-001	MaWa	Review Coordin	...
ng Department cycle #1	zBinderTest 01 2018-07-10	zBinderTest 01 2018-07-10 - Building Plan Check Review - 7/10/2018 6:39:06 PM	Plumbing	...

# Column Filter

- Type string in field. Filtering occurs in real time.



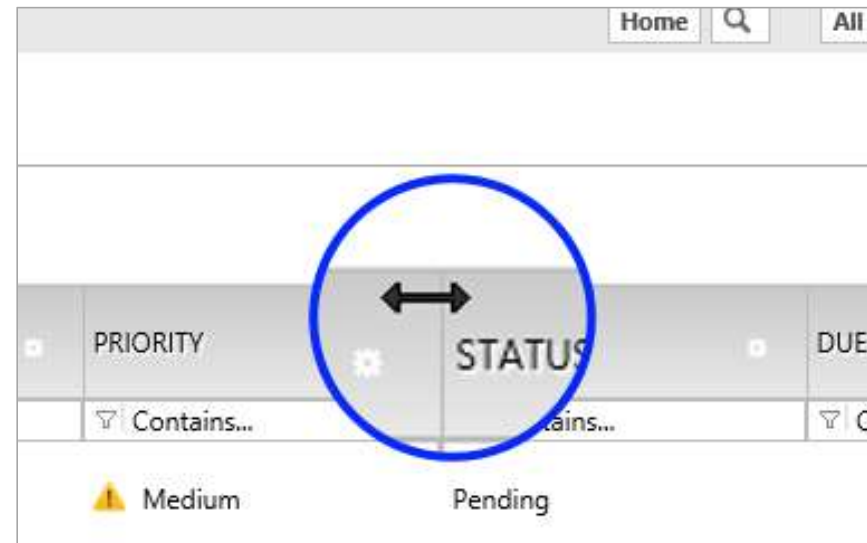
The screenshot shows a software interface with a table. At the top, there are tabs for 'Tasks' and 'Projects', and buttons for 'Refresh', 'Save Settings', and 'Reset Settings'. The table has columns: OPTIONS, TASK, PROJECT, INSTANCE, GROUP, ASSIGNMENT, STATUS, PRIORITY, DUE DATE, and CREATED. The STATUS column has a filter dropdown menu open, showing the text 'Pendi' entered. A blue circle highlights the filter dropdown. The table displays 5 matching records.

OPTIONS	TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT	STATUS	PRIORITY	DUE DATE	CREATED
	Contains...	Contains...	Contains...	Contains...	Contains...	Pendi	Contains...	Contains...	On...
	<a href="#">Applicant Upload Task</a>	<a href="#">zMaWa Reassignment Test</a>	zMaWa Reassignment Test - PF_BIC_Building_LAB - 4/23/2018 1:07:40 PM	Applicant	FirstInGroup	Pending	Medium		4/23/2018 1:18:24 PM
	<a href="#">Review Complete Task</a>	<a href="#">BU-2018-PA Mara</a>	BU-2018-PA Mara - Building Plan Check Review - 4/25/2018 11:56:45 AM	Review Coordinator	FirstInGroup	Pending	Medium		4/25/2018 12:16:57 PM
	<a href="#">Mechanical Department Review cycle #1</a>	<a href="#">BU-2018-PA Wally</a>	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Mechanical	FirstInGroup	Pending	Low	5/4/2018 11:51:00 AM	4/25/2018 12:02:22 PM
	<a href="#">Electrical Department Review cycle #1</a>	<a href="#">BU-2018-PA Wally</a>	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Electrical	FirstInGroup	Pending	Low	5/4/2018 11:51:00 AM	4/25/2018 12:02:22 PM
	<a href="#">Plumbing Department Review cycle #1</a>	<a href="#">BU-2018-PA Wally</a>	BU-2018-PA Wally - Building Plan Check Review - 4/25/2018 11:56:42 AM	Plumbing	Individual	Pending	Low	5/4/2018 11:51:00 AM	4/25/2018 12:02:22 PM

5 matching records

# Column Width Control

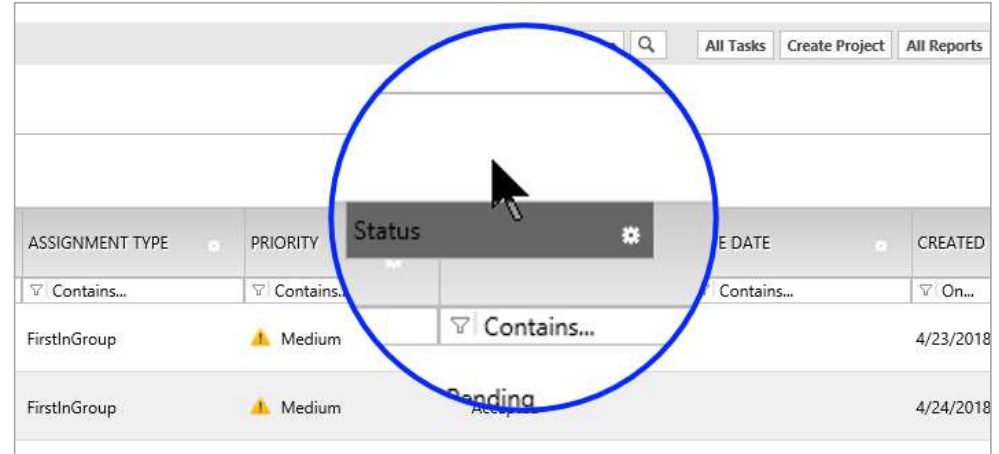
- Click and drag on column border to adjust width.





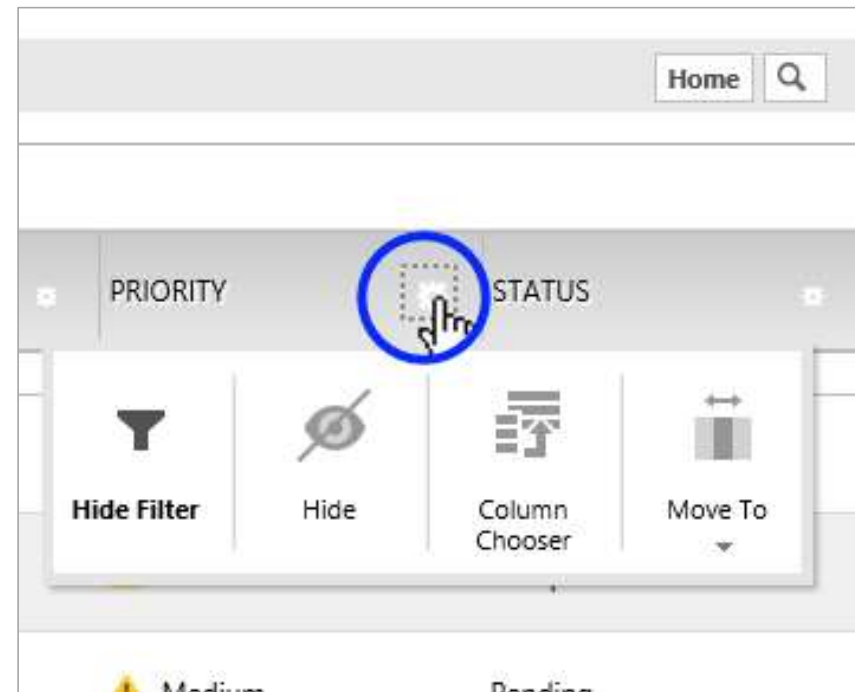
# Column Reorder

- Click and drag header to move column.



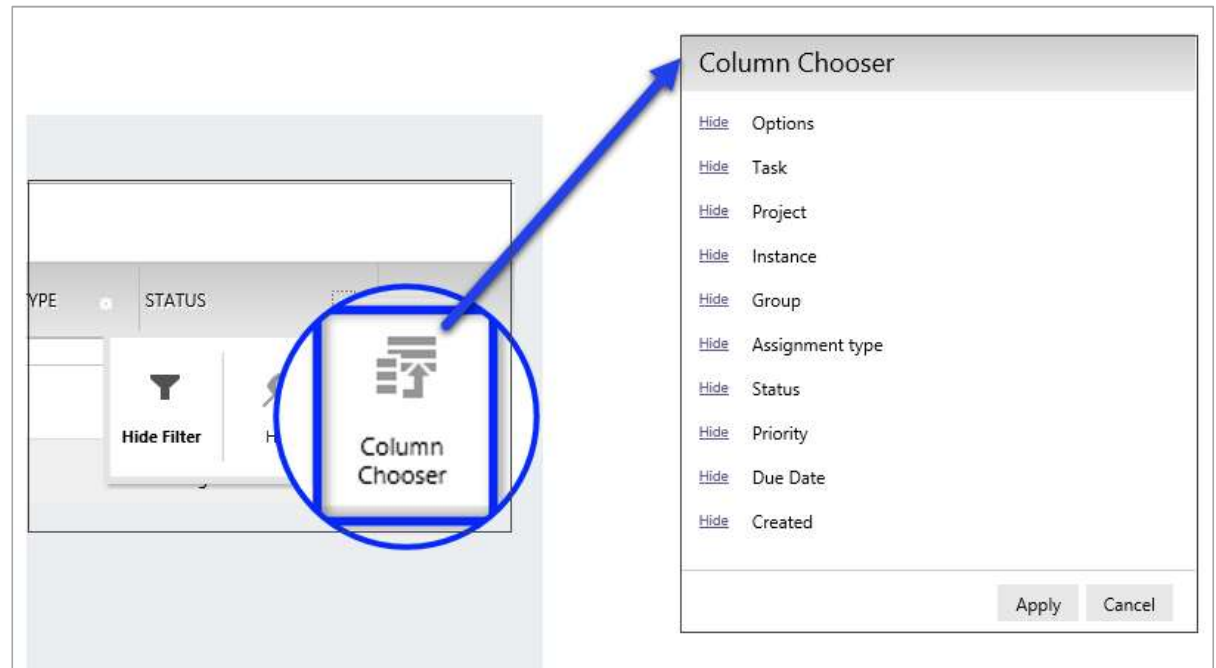
# Column Control

- Click gear icon to access: Hide Filter, Hide, Column Chooser, and Move To.



# Column Chooser

- Easy show/hide columns control.



# Save Settings

- Refresh updates the data in the grid.
- Save settings is persistent.
- Reset settings button only appears if there have been changes.
- Reset restores default settings.

Tasks Projects			
Refresh Save Settings Reset Settings			
OPTIONS	TASK	PROJECT	INSTANCE
	Contains...	Contains...	Contain
	<a href="#">Applicant Upload Task</a>	<a href="#">zMaWa Reassignment Test</a>	zMaWa Reassignm PF_BIC_Bui - 4/23/201 PM
	<a href="#">Review Complete Task</a>	<a href="#">BU-2018-PA Mara</a>	BU-2018-P Building Pl Review - 4/

# Quick Filter

Tasks

Projects

Refresh

Save Settings





Quick Filter:

Applicant Upload

Screen

Department Review

Batch Stamp









OPTIONS	TASK	PROJECT	INSTANCE	GROUP
	▼	▼ Contains...	▼ Contains...	▼ Co
	<a href="#">Assign Reviewers Task</a>	<a href="#">Test for Reassign</a>	Test for Reassign - BIC Building - Demo - 4/23/2018 3:06:10 PM	Review
	<a href="#">Review Complete Task</a>	<a href="#">zTraining for Mara - Plan Reviewers</a>	zTraining for Mara - Plan Reviewers - Building Plan Check Review - 5/18/2018 5:35:08 AM	Review
	<a href="#">Applicant Upload Task</a>	<a href="#">zMaWa Reassignment Test</a>	zMaWa Reassignment Test - PF_BIC_Building_LAB - 4/23/2018 1:07:40 PM	Applic
	<a href="#">Screen Review Task</a>	<a href="#">BU-2018-001</a>	MaWa	Review

9.X ProjectFlow Likely to be used by Review Coordinators. Setup must be configured by System Admin.

# Quick Filter

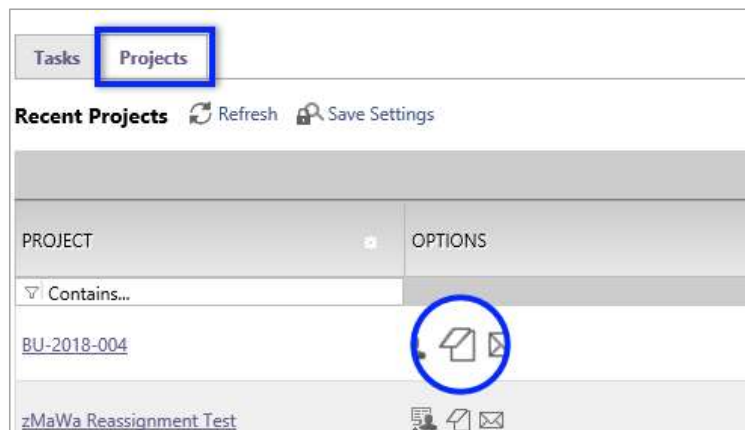
Tasks Projects

Refresh Save Settings Quick Filter: Applicant Upload Screen Department Review Batch Stamp

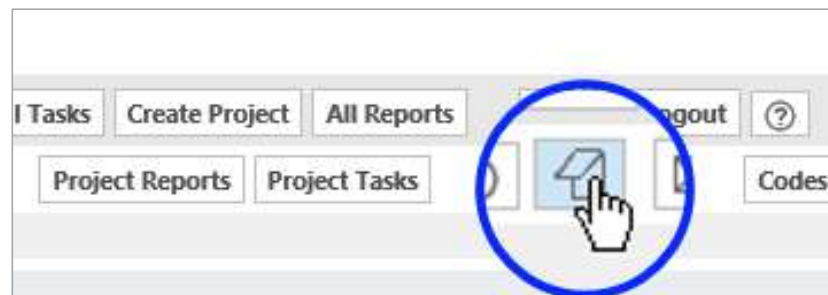
OPTIONS	TASK	PROJECT	INSTANCE	GROUP
	Contains...	Contains...	Contains...	Contains...
 	<a href="#">Assign Reviewers Task</a>	<a href="#">Test for Reassign</a>	Test for Reassign - BIC Building - Demo - 4/23/2018 3:06:10 PM	Review
 	<a href="#">Review Complete Task</a>	<a href="#">zTraining for Mara - Plan Reviewers</a>	zTraining for Mara - Plan Reviewers - Building Plan Check Review - 5/18/2018 5:35:08 AM	Review
 	<a href="#">Applicant Upload Task</a>	<a href="#">zMaWa Reassignment Test</a>	zMaWa Reassignment Test - PF_BIC_Building_LAB - 4/23/2018 1:07:40 PM	Applic
 	<a href="#">Screen Review Task</a>	<a href="#">BU-2018-001</a>	MaWa	Review

# Discussion Board – Project Level

## Access from Home page:



## Access from inside the project:



# Discussion Board – Add Topic

**Discussion Topics**

Project: BU-2018-004

Add Topic

Show 5 records

OPTIONS	DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS	DATE/TIME
0 - 0 of 0 records					

prev 1 next



# Discussion Board – Create Topic

## Discussion Topics

Project: BU-2018-004

1

Topic:\* Specifications

2

Category:

Notification of Update or Availability  
ProjectFlow  
Request for Information

3

Comment:

Who determines the applicable specs in this instance?

4

Manage Participants

Save and Prepare Email

Save

Cancel

Show 5 records

OPTIONS	DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS	DATE/TIME
0 - 0 of 0 records					

prev

1

next

# Discussion Board – Additional Actions

**Discussion Topics**

Project: BU-2018-004

Add Topic

Show 5 records

OPTIONS	DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS	DATE/TIME
<div>Manage Participants</div> <div>+ Close Topic</div> <div>Add Comment</div>	Specifications	Request for Information	Wally Taylor	Active	5/29/2018 11:57:24 AM

1 - 1 of 1 records

← prev

1

next →

# Discussion Board – Manage Participants

**Discussion Topics**

Project: BU-2018-004

**Manage Participants**

**Groups/Users for Exclusion**

Project: BU-2018-004

Discussion Leader: Taylor, Wally

Discussion Topic: Specifications

	GROUP
+ <input type="checkbox"/>	Non-Group members
+ <input type="checkbox"/>	Applicant
+ <input type="checkbox"/>	Building Plans Examiner
+ <input type="checkbox"/>	Electrical
+ <input type="checkbox"/>	Electrical Sub

1 - 5 of 11 records

Save Close

9.X Only topic owner (leader) can manage participants. Select groups or users to exclude them from the topic. Once excluded they cannot be selected to receive email for the topic.

# Discussion Board – Email

Add Topic

Show 5 records

OPTIONS	DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS	DATE/TIME
<div>Manage Participants</div> <div>Close Topic</div> <div>Add Comment</div>	Specifications	Request for Information	Wally Taylor	Active	5/29/2018 11:57:24 AM

COMMENTS

	PARTICIPANT	COMPANY	DATE/TIME	OPTIONS
Who determines the applicable specs in this instance?	Wally Taylor	Avolve Software Corporation	5/29/2018 11:57:24 AM	<div>Prepare Email</div>

Add Comment

The city, because...

Save

Save and Prepare Email

9.X Any member of the discussion can add comments and optionally send as Email. A comment can be sent as a message at the time it is created, or thereafter.

# Discussion Board – Other Actions

The screenshot displays a web application interface for a Discussion Board. At the top left is an "Add Topic" button. Below it is a table with columns: OPTIONS, DISCUSSION TOPIC, CATEGORY, LEADER, DISCUSSION STATUS, and DATE/TIME. A "Show 5 records" dropdown is in the top right. A blue circle highlights a "+" icon in the OPTIONS column of the first row. A modal window is open, showing a detailed view of the first topic: "More exciting demo topic - not". The modal includes a "COMMENTS" section with a text area and "Add Comment" button. At the bottom of the modal are "Save" and "Save and Prepare Email" buttons. The modal also displays participant information: Wally Taylor, Avolve Software Corporation, and the date/time 7/30/2018 10:54:58 AM.

OPTIONS	DISCUSSION TOPIC	CATEGORY	LEADER	DISCUSSION STATUS	DATE/TIME
+ Add	More exciting demo topic - not	Request for Information	Wally Taylor	Active	7/30/2018 10:54:58 AM
-					7/30/2018 10:47:50 AM

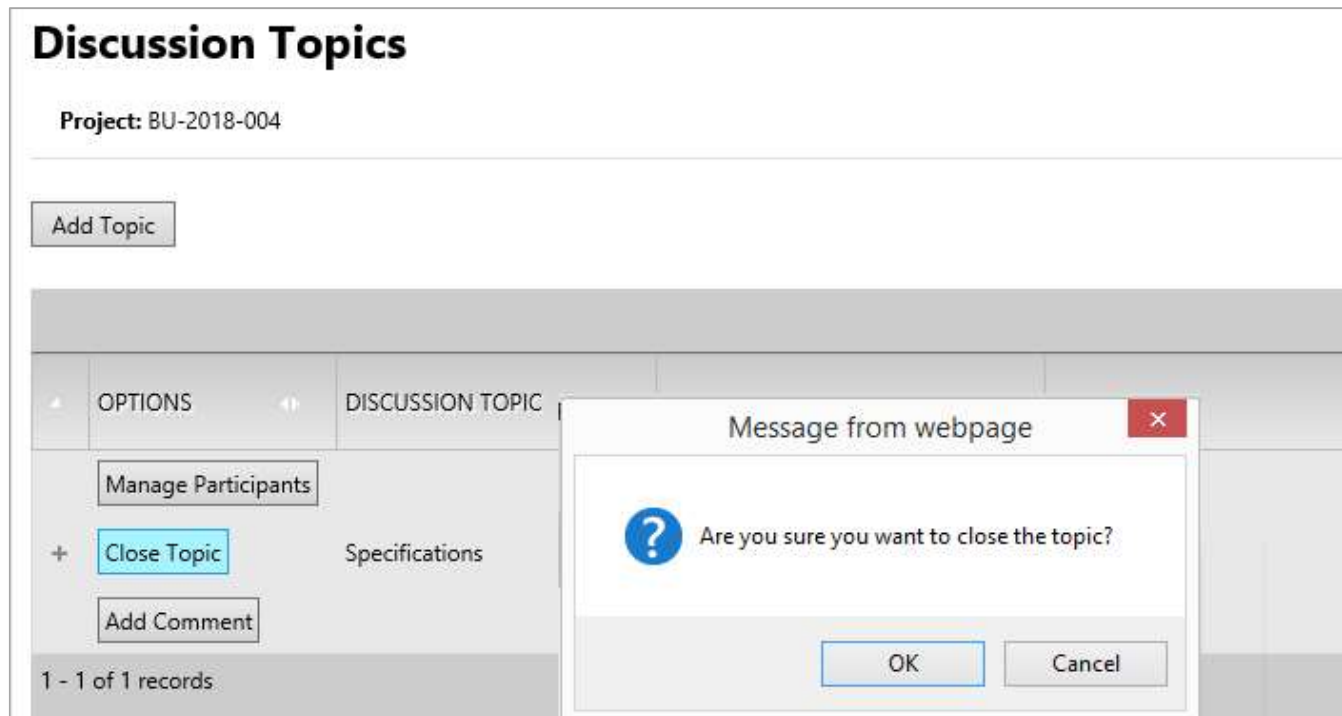
COMMENTS

Blah blah blah

Add Comment


















Save Save and Prepare Email

# Discussion Board – Closing Topic



# Reports

# Reports – New SiteWide Reports

View	Report Name	Report T	Report Description
	Sitewide - Active and Revoked User Counts	SiteWide	Active and Revoked Users Counts
	Sitewide - All Logged In Users	SiteWide	All Logged In Users
	Sitewide - All Projects Info Report	SiteWide	All Projects Info Report
	Sitewide - Configuration Changes By Date	SiteWide	Configuration Changes By Date
	Sitewide - Emails Sent Detail By Date	SiteWide	Emails Sent Detail By Date
	Sitewide - Events By Date	SiteWide	Logged Events By Date
	Sitewide - Login Failures By Date	SiteWide	Login Failures By Date
	Sitewide - Login Success By Date	SiteWide	Login Success By Date
	Sitewide - Site Activity Report By Date	SiteWide	Site Activity Report By Date
	Sitewide - Timesheet Logs	SiteWide	Displays a list of all timesheet values entered across all pr...
	Sitewide - Unpublished Files	SiteWide	All Unpublished Files
	Management - Average Turnaround Time Report	SiteWide	View statistics of applicant and jurisdiction tasks for workf...
	Management - Overdue Task Detail Report	SiteWide	Displays details on overdue tasks for the specified project...
	Management - Task Statistics Report	SiteWide	Displays the completed tasks for the specified project te...
	Management - Task Status Report Dashboard	SiteWide	Displays overdue and open tasks count per group in a ch...
	Management - Workload Report	SiteWide	Lists the accepted or pending workflow tasks for the spec...
	Sitewide - ProjectDox Configuration	SiteWide	Displays all the Admin configurations in the system.

Page 1 of 1 (17 items)



## Management - Average Turnaround Time Report

**Project Template:** ProjectDox Demo

**Start & End Date:** 2/1/2018 to 4/1/2018

**Report Generated:** 04/01/2018 10:48 AM

Project Template Name	Grouping	Task Name	Project Name	Group Name	User Name	Days	Task Count
ProjectDox Demo	Applicant	Applicant Resubmit Task	Portland Demo	Applicant	Duane Green	1	1
					Avg Days/Total Count	1	1
					Avg Days/Total Count	1	1
			Tracy Convention Center	Applicant	Duane Green	1	1
					Avg Days/Total Count	1	1
					Avg Days/Total Count	1	1
		Applicant Upload Task	Portland Demo	Applicant	Duane Green	1	1
						1	1
					Avg Days/Total Count	1	2
					Avg Days/Total Count	1	2
			Microsoft Azure Project	Applicant	Duane Green	1	1

## Management - Overdue Task Detail Report

Project Template Name: ProjectDox Demo  
Report Generated: 04/01/2018 10:41 AM

Group Name	User Name	Task Name	Project Name	Task Status	Task Assigned Date	Task Accepted Date	Task Due Date	Avg Overdue Days
Electrical	TF01 Demo User	Electrical Department Review Cycle #1 (Reassigned from TF01 Demo User)	Corp Offices - BPA-1342	Accepted	12/21/2017 9:59:59 AM	12/21/2017 10:02:07 AM	12/6/2017 11:14:00 AM	116.00
		Average Days						116.00
		Average Days						116.00
	Average Days						116.00	
Structural	Duane Green	Structural Department Review cycle #1	San Diego Building Department	Accepted	3/23/2018 11:49:26 AM	3/23/2018 11:49:59 AM	3/23/2018 11:49:00 AM	9.00
		Average Days						9.00
		Average Days						9.00
	Average Days						9.00	
Average Days							62.50	

## Management - Task Statistics Report

**Project Template Name:** BIC Building - Demo

**Start & End Date:** 2/1/2018 to 4/1/2018

**Report Generated:** 04/01/2018 10:56 AM

### By Cycle

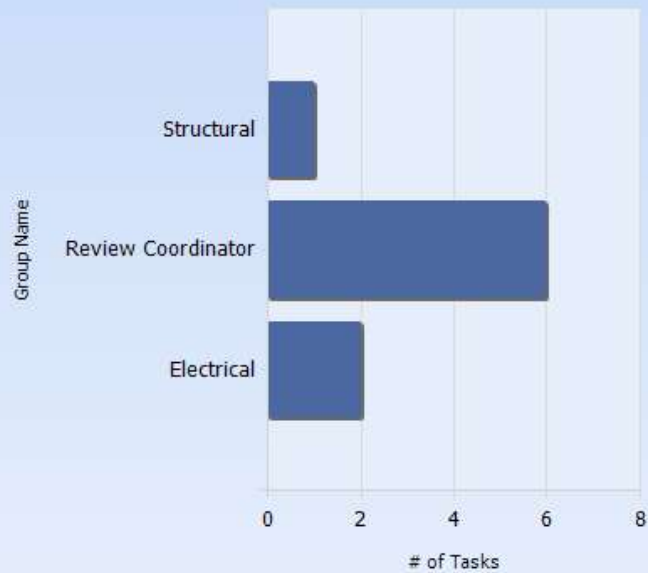
Project Template Name	Cycle	Group Name	User Name	Avg Days	Task Count
BIC Building - Demo		Applicant	Mara Fitter		
			Avg Days/Total Count	1.00	3
		Review Coordinator	Mara Fitter		
			Avg Days/Total Count	1.00	8
			Avg Days/Total Count	1.00	11
	1	Applicant	Mara Fitter	1.00	1
			Avg Days/Total Count	1.00	1
		Mechanical	Mara Fitter	1.00	1
			Avg Days/Total Count	1.00	1
		Plumbing	Wally Taylor		
			Mara Fitter	1.00	1
			Avg Days/Total Count	1.00	3
		Review Coordinator	Mara Fitter		
			Avg Days/Total Count	1.00	3
			Avg Days/Total Count	1.00	8
	2	Plumbing	Wally Taylor	1.00	1
			Avg Days/Total Count	1.00	1
		Review Coordinator	Mara Fitter	1.00	1
			Avg Days/Total Count	1.00	1
			Avg Days/Total Count	1.00	2
			Avg Days/Total Count	1.00	21

## Management - Task Status Report Dashboard

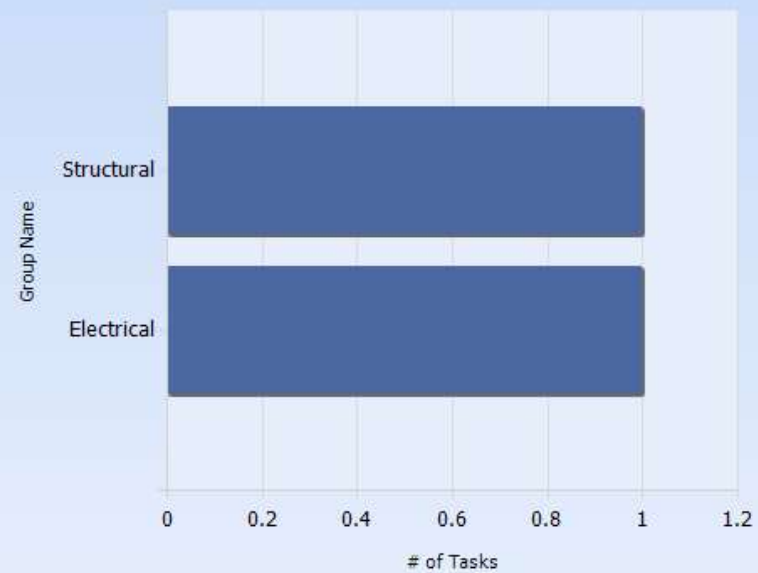
**Project Template Name:** ProjectDox Demo

**Report Generated:** 04/01/2018 11:08 AM

### Open Tasks by Group



### Overdue Tasks by Group



## Management - Workload Report






**Project Template Name:** ProjectDox Demo

**Group(s):** Applicant, Electrical, Structural

**Report Generated:** 04/01/2018 11:11 AM

Days Outstanding ↕	Task Due Date ↕	Review Cycle ↕	Project Name ↕	Project Description ↕	Group Name ↕	Task Status ↕	Date Created ↕	Date Updated ↕	User Name ↕	Task Name ↕	Project Template Name ↕
186			zWally Building Test 01	Test	Applicant	Pending	9/28/2017 9:34:13 AM	9/28/2017 9:34:13 AM		Applicant Upload Task	ProjectDox Demo
174			Test Juan	Please don't delete this project	Applicant	Pending	10/10/2017 3:25:13 PM	10/10/2017 3:25:13 PM		Applicant Upload Task	ProjectDox Demo
137			Benedict Builders	Whisper Rock	Applicant	Pending	11/16/2017 10:55:29 AM	11/16/2017 10:55:29 AM		Applicant Upload Task	ProjectDox Demo
111			Green Builders	Subdivision A	Applicant	Pending	12/12/2017 12:06:28 PM	12/12/2017 12:06:28 PM		Applicant Upload Task	ProjectDox Demo
6			BPA-1	LAB 032618-1	Applicant	Pending	3/27/2018 3:17:11 PM	3/27/2018 3:17:11 PM		Applicant Upload Task	ProjectDox Demo
6			BPA-7	LAB 032718-3Amendments	Applicant	Pending	3/27/2018 3:33:40 PM	3/27/2018 3:33:40 PM		Applicant Upload Task	ProjectDox Demo
13			Portland Demo	Demonstration of ProjectDox 9	Applicant	Accepted	3/20/2018 2:58:23 PM	3/20/2018 2:59:01 PM	Duane Green	Applicant Upload Task	ProjectDox Demo
83		2	Corp HQ Remodel	Remodel Project	Electrical	Accepted	1/9/2018 3:02:28 PM	1/9/2018 3:05:39 PM	Duane Green	Electrical Department Review Cycle #2	ProjectDox Demo

# Reports – New Project Reports

View	Report Name	Report Type	Report Description
	Current Project - All Emails Sent Detailed Report	Project	All Emails Sent Detailed Report
	Current Project - All Emails Sent Summary Report	Project	All Emails Sent Summary Report
	Current Project - All Files Report	Project	All Uploaded Files Report
	Current Project - All Group Users	Project	All Project Group Users
	Current Project - All Uploaded Files with Sheet Sizes	Project	All Uploaded Files with Sheet Sizes
	Current Project - Discussion Board Report	Project	Discussion Board Report
	Current Project - Files Viewed By Date	Project	Files Viewed By Date
	Current Project - Folders Entered By Date	Project	Folders Entered By Date
	Current Project - Project Markups Listing	Project	All File Markups Listing
	Current Project - Unpublished Files	Project	Unpublished Files
	Current Project - Users Entered By Date	Project	Users Entered By Date
	ProjectFlow - Changemarks	Workflow	The Changemarks Report displays all changemarks for a workflow.
	ProjectFlow - Checklist Items	Workflow	The Checklist Report displays all checklist items for a workflow.
	ProjectFlow - Department Review Status	Workflow	The Department Review Status Report displays the status of all reviews for a workflow.
	ProjectFlow - Discussion Board Plan Review Report	Workflow	Discussion Board Plan Review Report
	ProjectFlow - Parallel Review - Department Review...	Workflow	Displays the status of all reviews for each of the sub-workflows in a parallel review.
	ProjectFlow - Parallel Review - Workflow Routing Slip	Workflow	Displays the sequential route of all tasks for each of the sub-workflows in the parallel...
	ProjectFlow - Timesheet Logs	Workflow	Displays a list of all timesheet values entered in a specific project
	ProjectFlow - Workflow Routing Slip	Workflow	The Workflow Routing Slip Report displays the sequential route of all tasks for the w...
	Current Project - All Events Report	Project	Logged Events For a Project By Date
	ProjectFlow - Review Details Report	Workflow	Lists the review comments, checklist and changemark details for a workflow instance...

# Viewer Updates

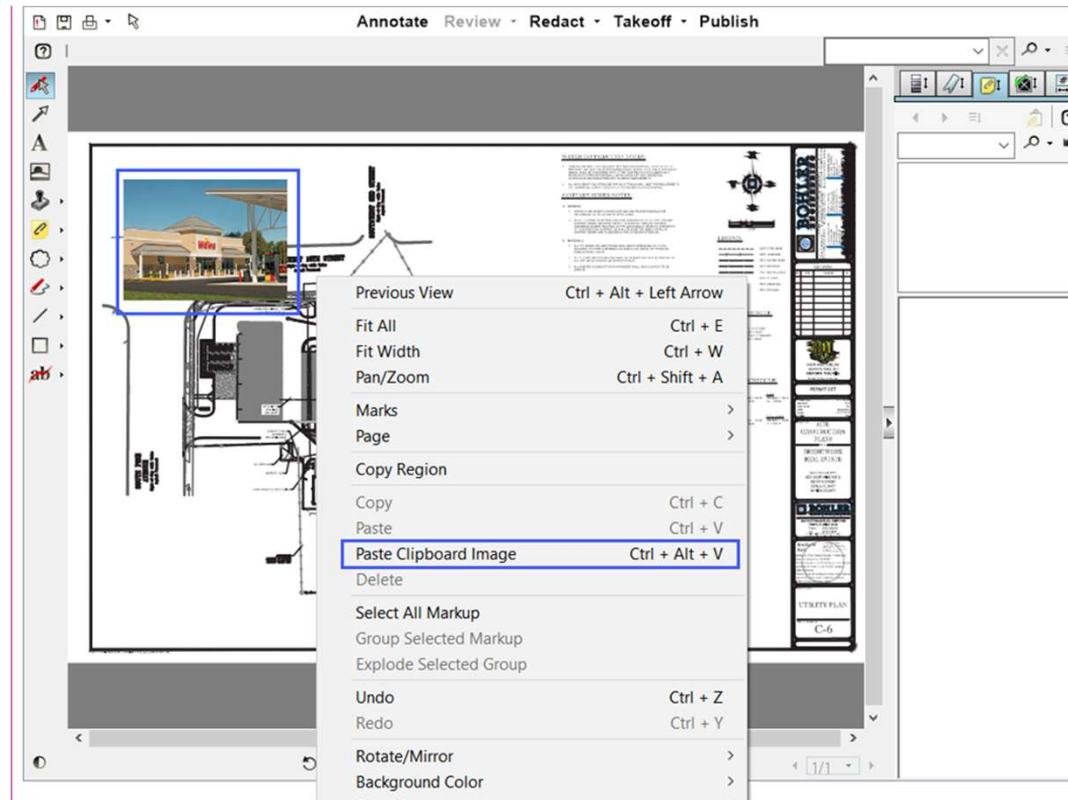
# Viewer Recommendations

- Viewing - HTML5 Viewer (Chrome, Edge, Firefox, Safari)
- Reviewing – ActiveX Viewer (Internet Explorer)
  - Provides additional tools
  - Tools are reliable
  - Tools are robust



# ActiveX (IE) Client Viewer Enhancements

# ActiveX Viewer Enhancements — Paste Clipboard Image



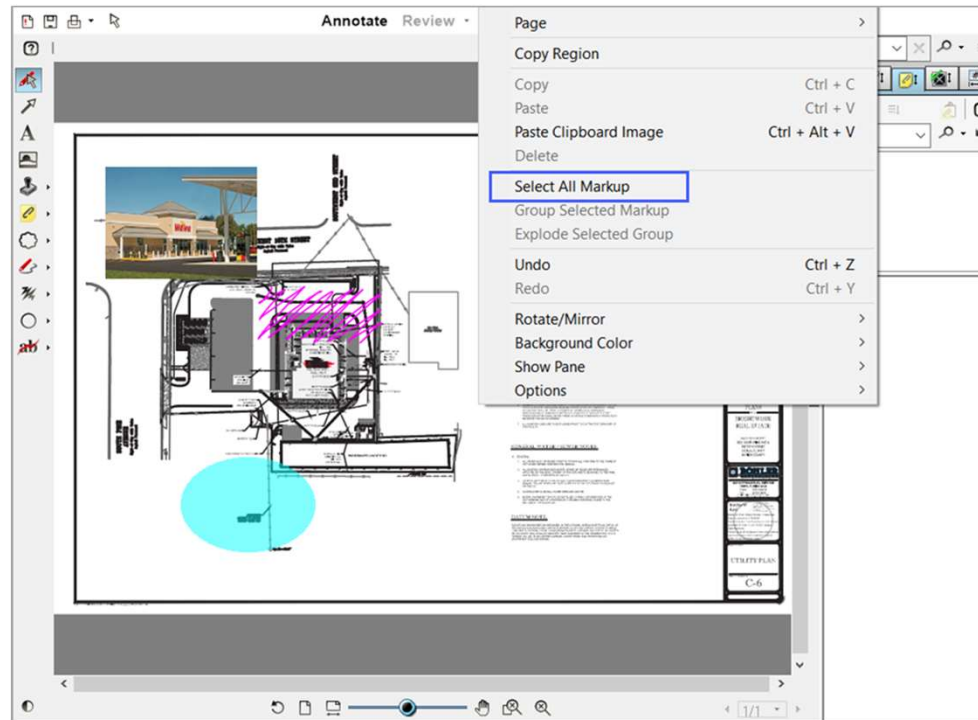
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## 8.6.5

In Annotation mode: allows you to paste a graphic from the clipboard (doesn't have to be from ProjectDox) into the markup layer. Use the right-click menu.

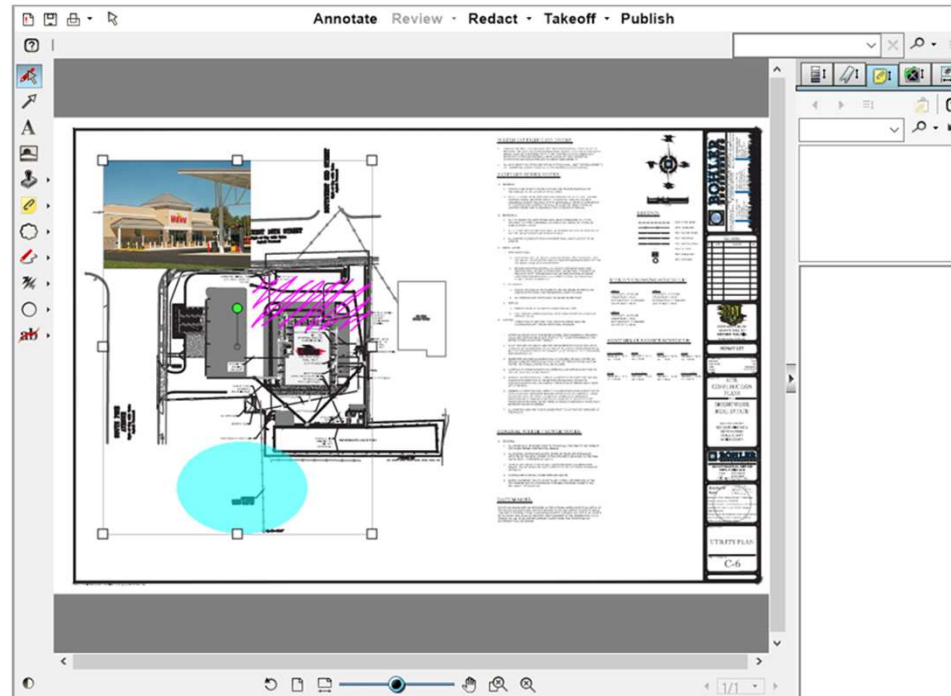
# ActiveX Viewer Enhancements — Select All Markup

- Use right-click menu:



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# ActiveX Viewer Enhancements – Select All Markup



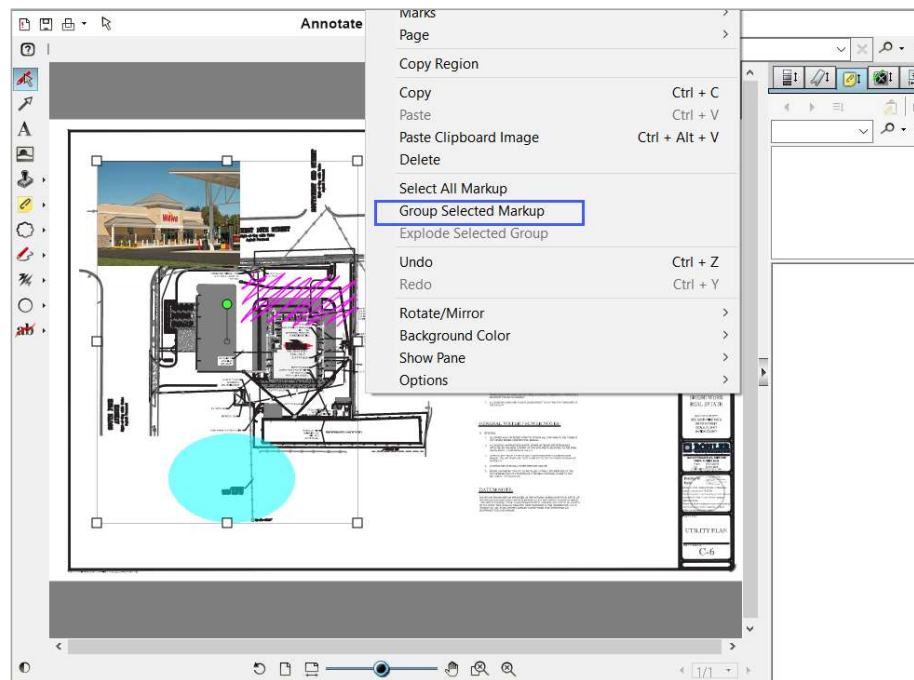
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## 8.6.5

Handles show the selection.

# ActiveX Viewer Enhancements – Group Selected Markup

- Right-click menu



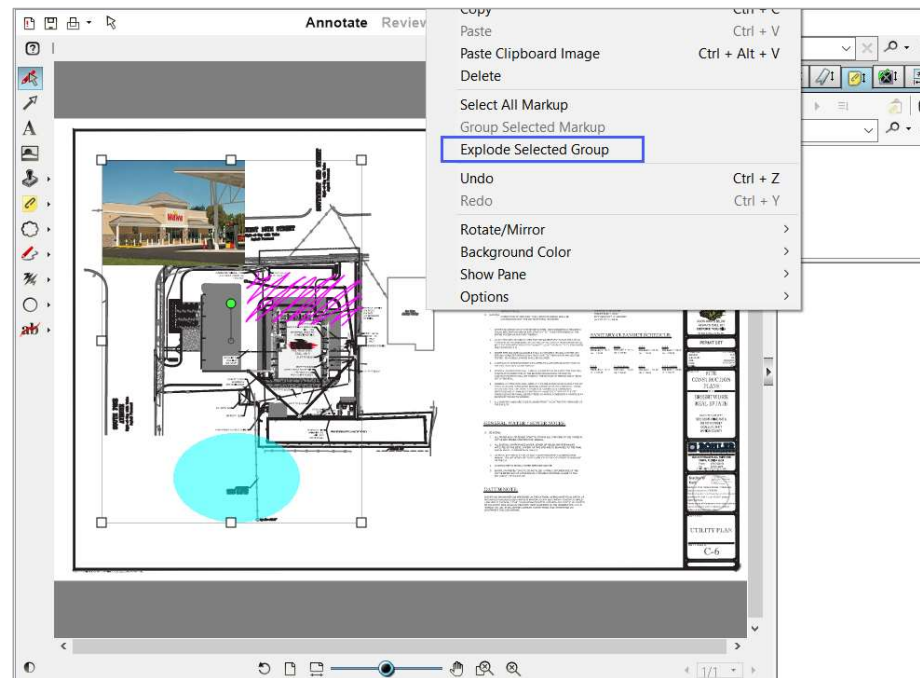
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## 8.6.5

Command groups the selected entities – they will act as a single entity for copying, moving, resizing, deleting, etc.

# ActiveX Viewer Enhancements — Explode Selected Group

- Right-click menu

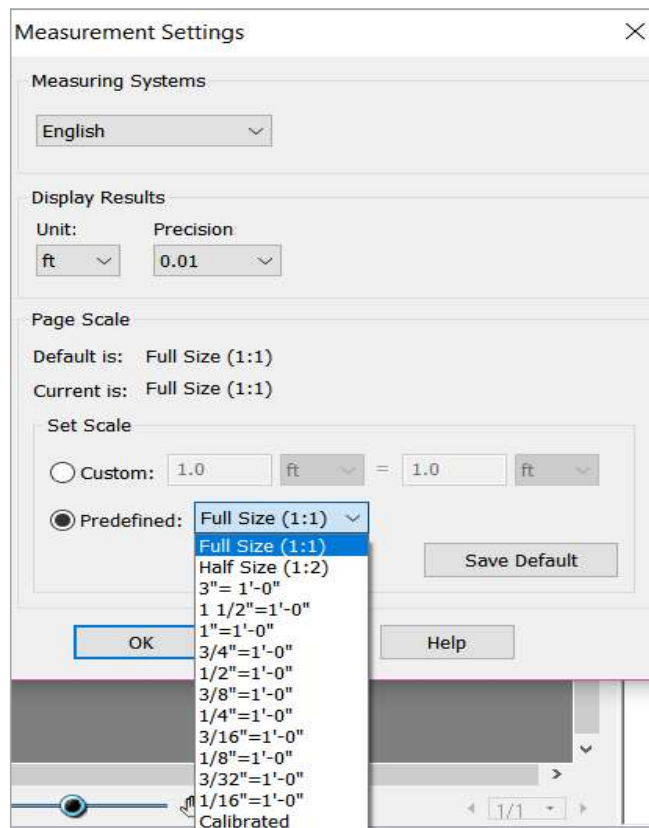


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## 8.6.5

Exploding returns the group to individual entities.

# ActiveX Viewer Enhancements — Predefined Scale

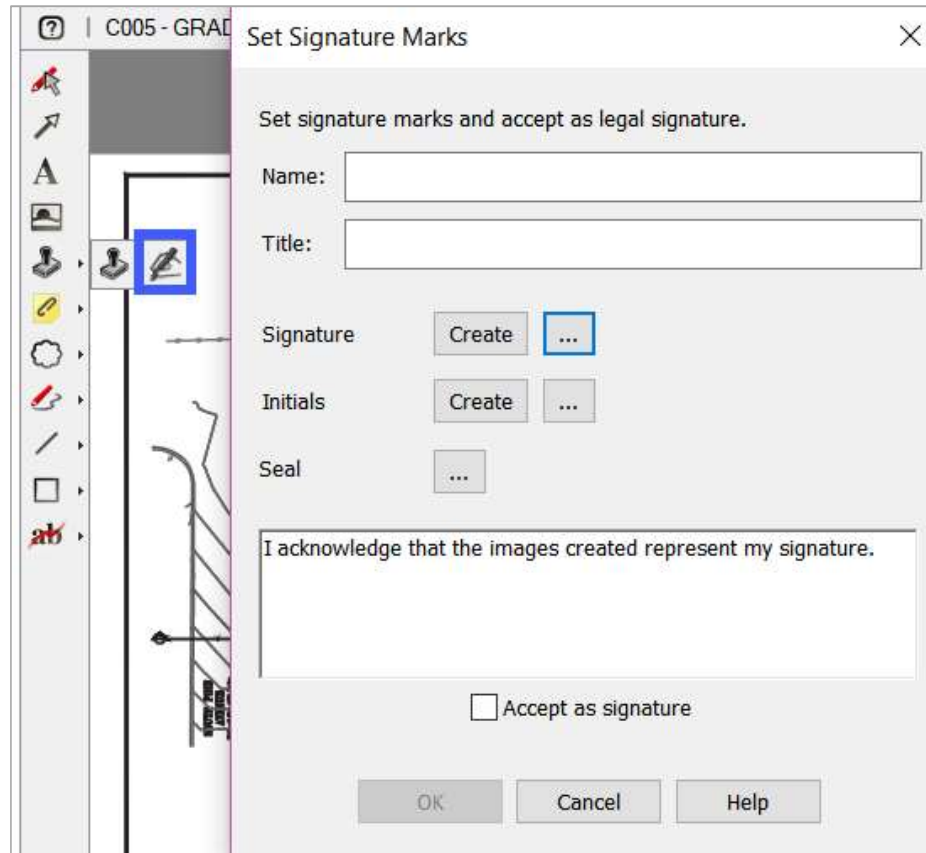


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## 8.6

Additional scales have been added to Predefined list. Currently the additions are visible with Windows 10.

# ActiveX Viewer Enhancements – E-Signature



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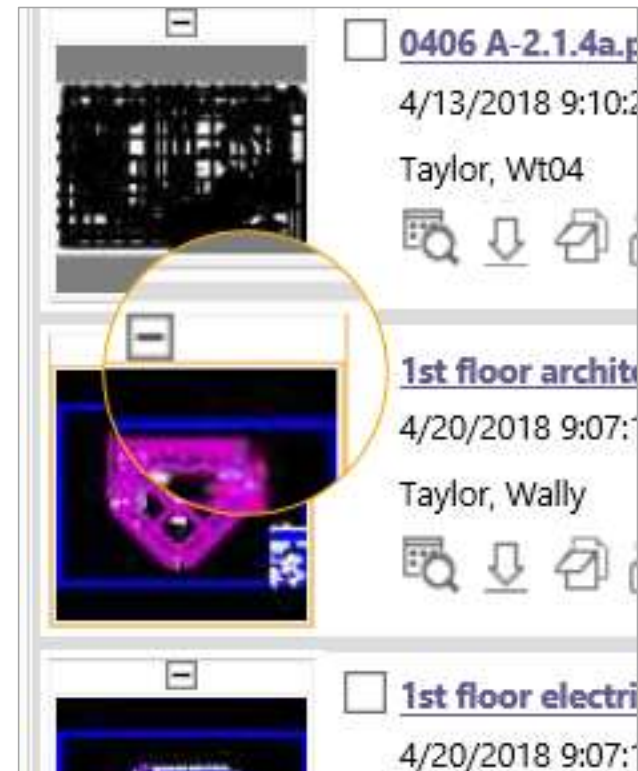
8.5

Stamp tool popover. Add scanned signature, Initials, and a seal image.



# ActiveX Viewer Enhancements – Thumbnail Highlight

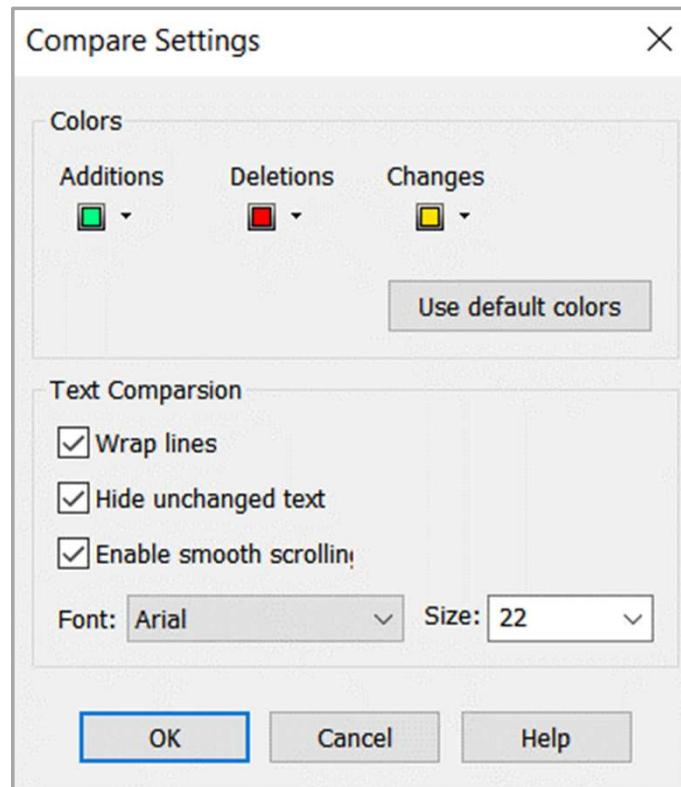
- When a file is open in the Viewer, the thumbnail in the file list is highlighted on the top edge.



# ActiveX Viewer Enhancements – Compare Settings



# ActiveX Viewer Enhancements – Compare Settings



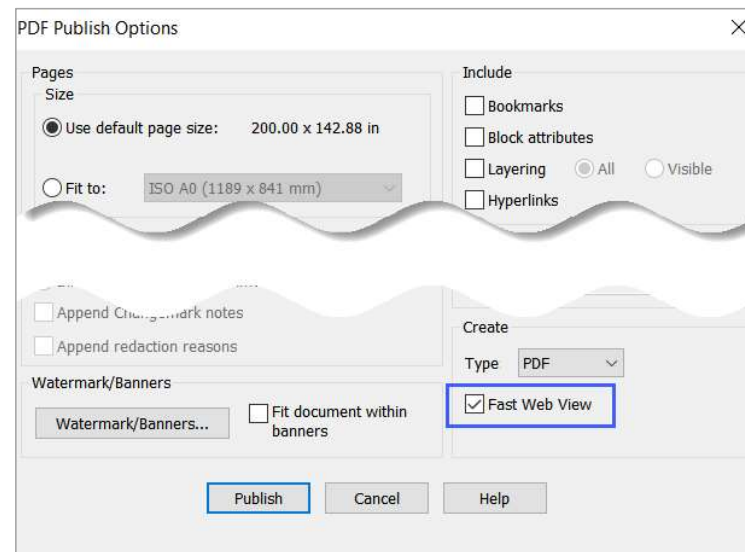
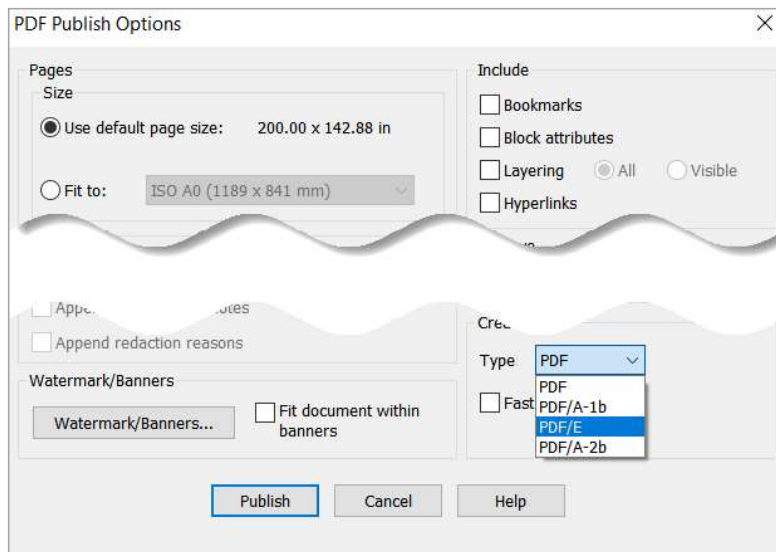
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8.5

Customize color for change categories.

# ActiveX Viewer Enhancements – PDF Publish Options



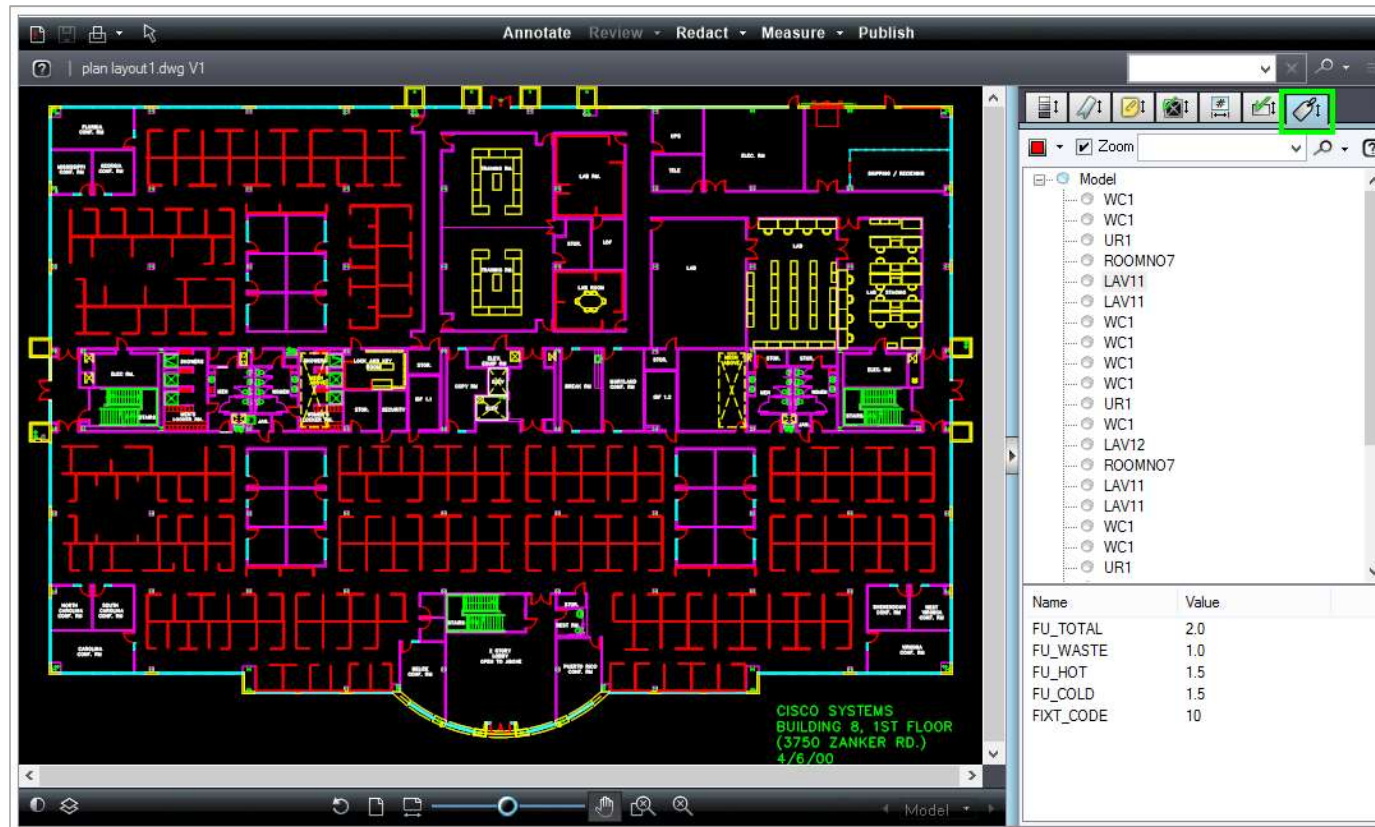
## 8.5

Added PDF/E support and Fast Web View for Publish to PDF.

PDF/E – an open, neutral exchange format for engineering and technical documents.

Fast Web View – File is structured so the web server sends only the requested page, rather than the entire PDF. This is helpful when viewing large documents.

# ActiveX Viewer Enhancements – CAD Attributes Panel



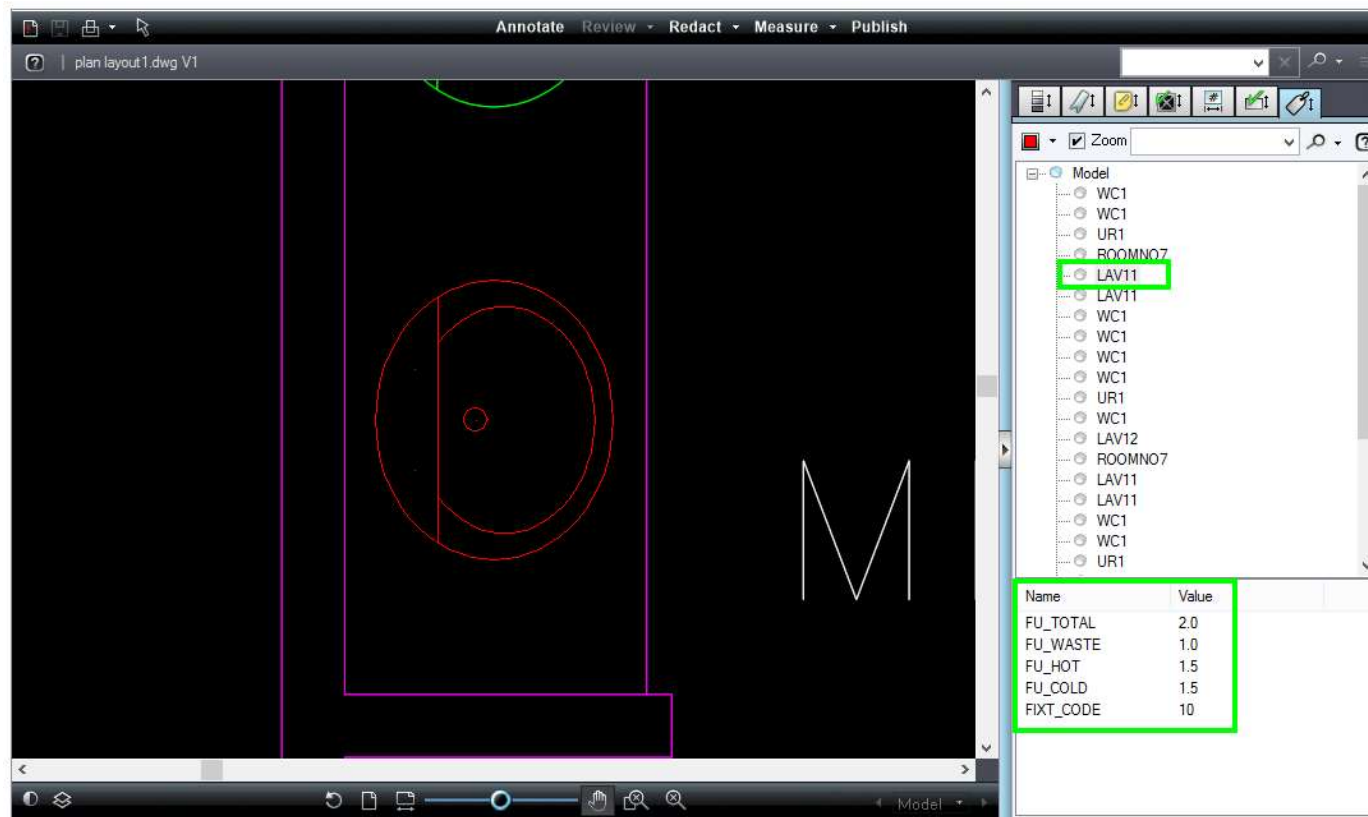
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## 8.5

Accessed from a tab in the Task Pane. The CAD Attributes panel displays the metadata contained in CAD drawings, in a hierarchic tree view with expandable/collapsible levels.

# ActiveX Viewer Enhancements – CAD Attributes Panel



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## 8.5

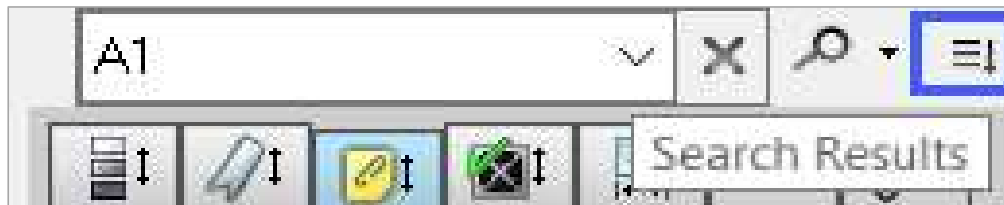
If you click on an attribute contained in the list, you are taken to that attribute location, shown at the view state that was established when the attribute was added.

# ActiveX Viewer Enhancements — Search Results Control



The Search Results control appears at the far right end of the Properties bar, when the Search feature is active.

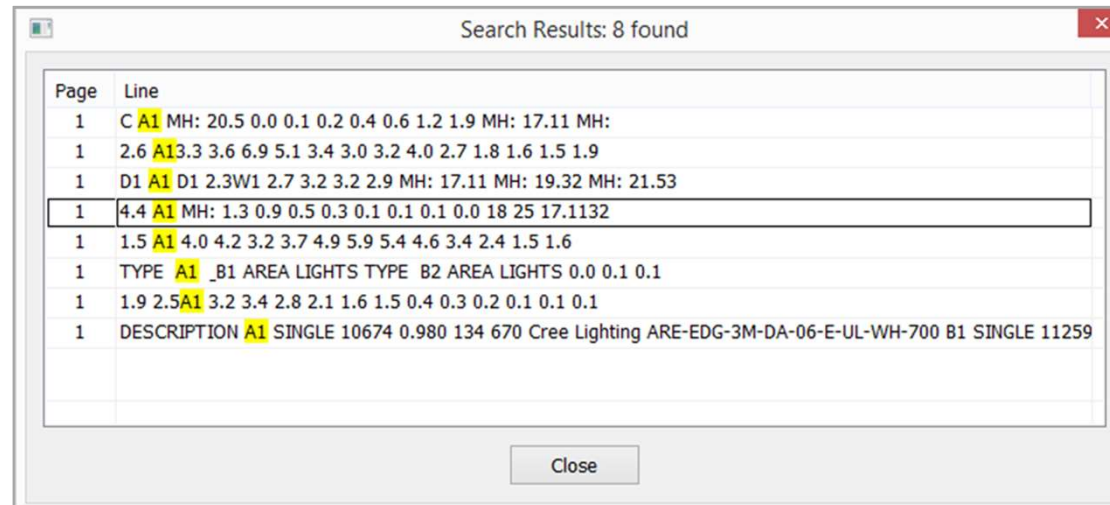
# ActiveX Viewer Enhancements – Search Results Control



8.6 Clicking on the control will display a count of matches for the current search, and information about each match, with string highlighted.



# ActiveX Viewer Enhancements – Search Results Control

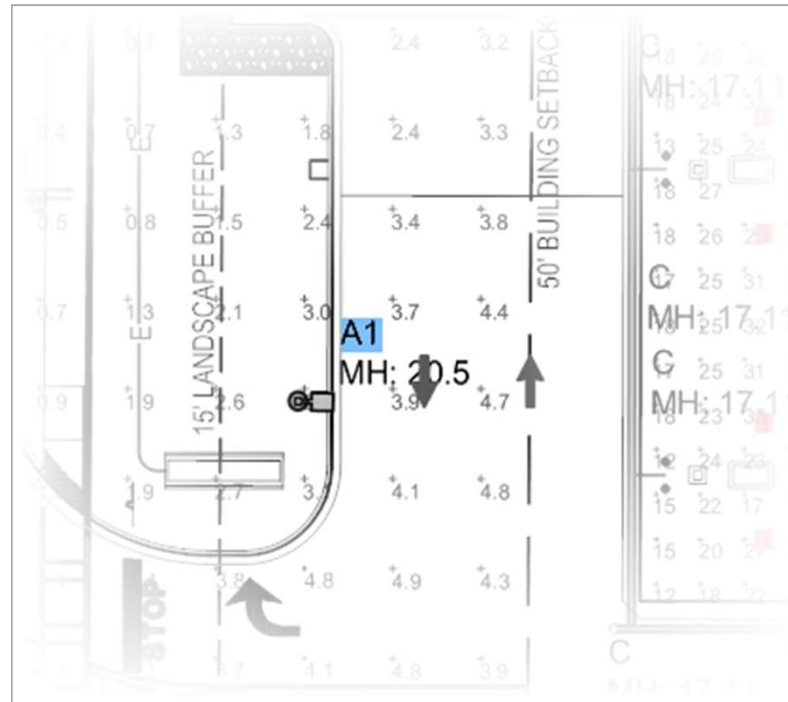


Search Results: 8 found

Page	Line
1	C A1 MH: 20.5 0.0 0.1 0.2 0.4 0.6 1.2 1.9 MH: 17.11 MH:
1	2.6 A1 3.3 3.6 6.9 5.1 3.4 3.0 3.2 4.0 2.7 1.8 1.6 1.5 1.9
1	D1 A1 D1 2.3W1 2.7 3.2 3.2 2.9 MH: 17.11 MH: 19.32 MH: 21.53
1	4.4 A1 MH: 1.3 0.9 0.5 0.3 0.1 0.1 0.1 0.0 18 25 17.1132
1	1.5 A1 4.0 4.2 3.2 3.7 4.9 5.9 5.4 4.6 3.4 2.4 1.5 1.6
1	TYPE A1 _B1 AREA LIGHTS TYPE B2 AREA LIGHTS 0.0 0.1 0.1
1	1.9 2.5 A1 3.2 3.4 2.8 2.1 1.6 1.5 0.4 0.3 0.2 0.1 0.1 0.1
1	DESCRIPTION A1 SINGLE 10674 0.980 134 670 Cree Lighting ARE-EDG-3M-DA-06-E-UL-WH-700 B1 SINGLE 11259

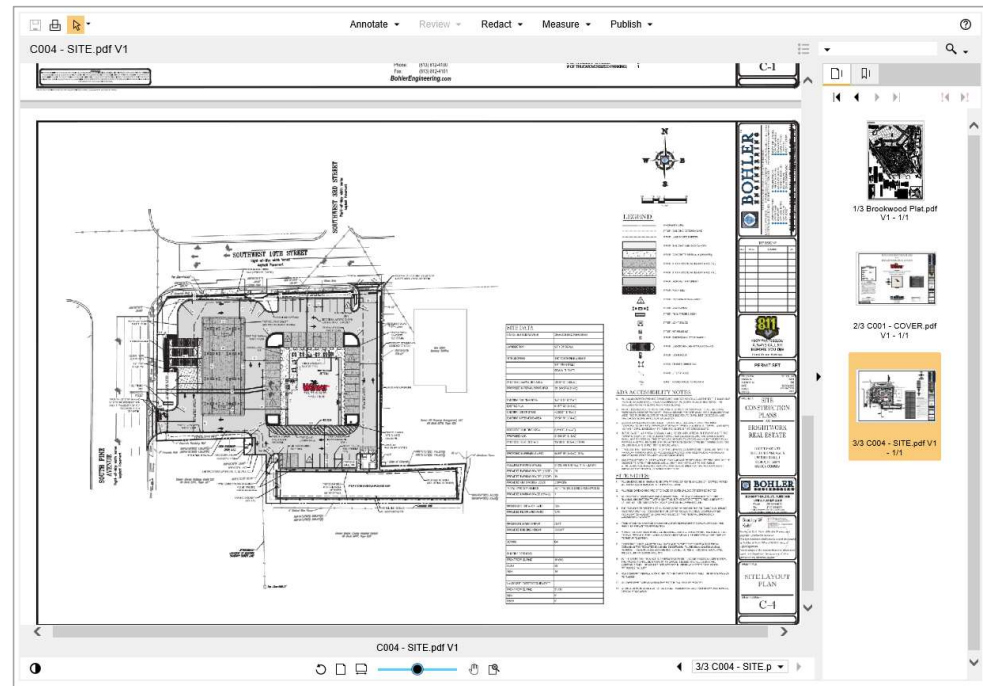
Close

# ActiveX Viewer Enhancements – Search Results Control



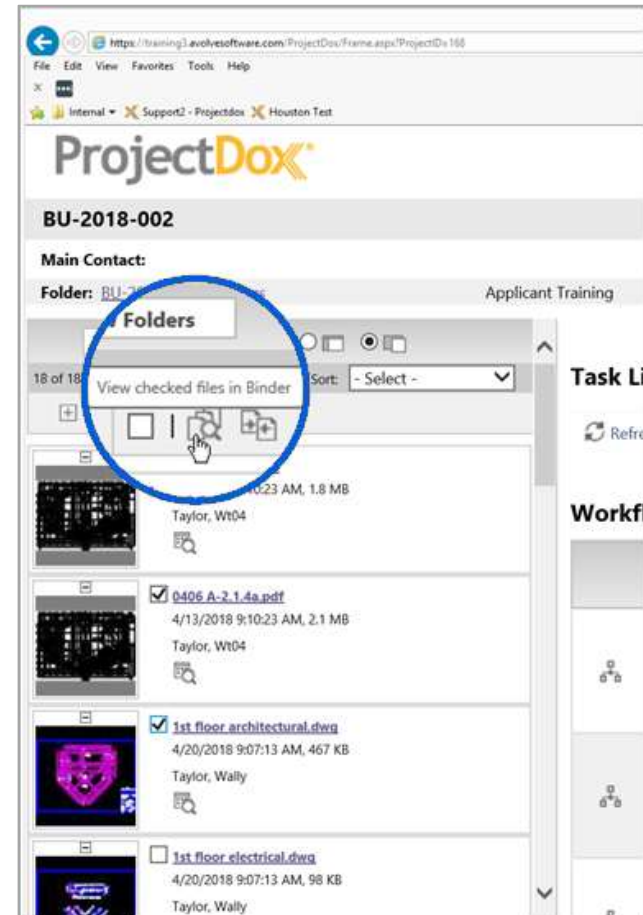
# Binder

- Opens multiple files in one Viewer window.



# Binder

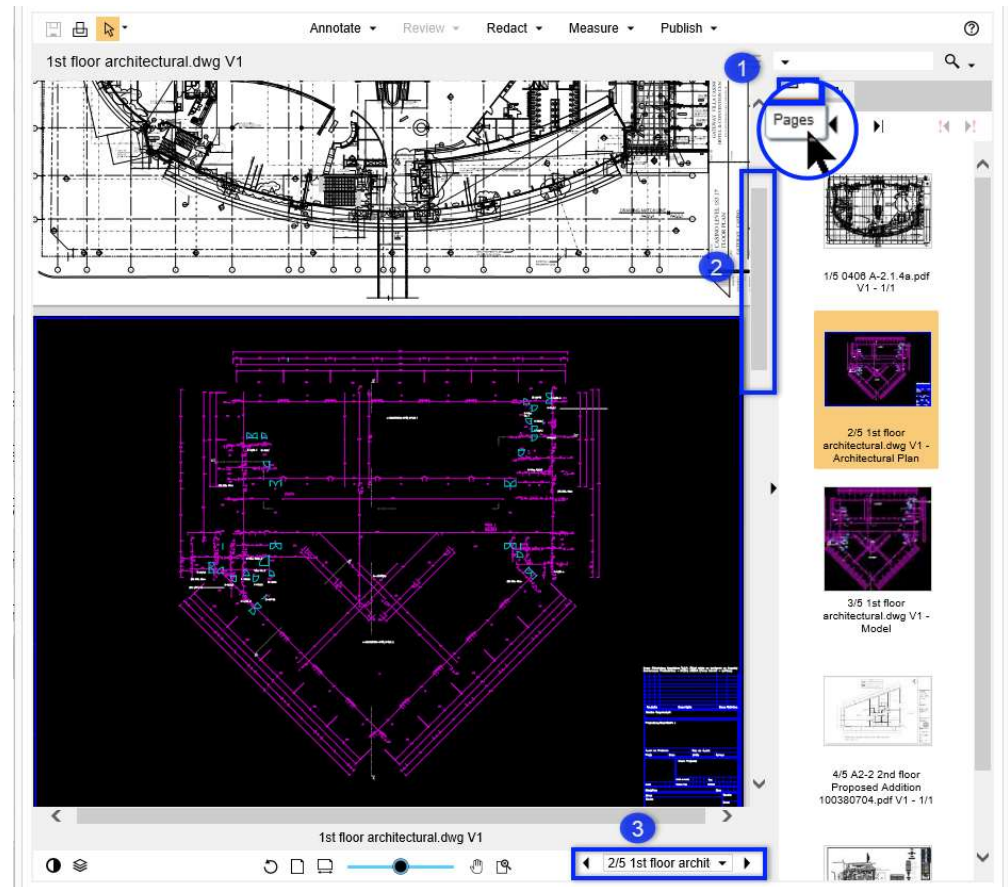
1. Click checkboxes to select files.
2. Click View checked files in Binder.



# Binder

You can navigate between files by 3 methods:

1. Pages tab (task pane).
2. Scroll bar.
3. Page controls.



# Binder

- When zoomed in on one file, the zoom setting remains while navigating to another file.
- CAD files will display both Model space and Layout layers when present.

# HTML5 Enhancements

# HTML Features Matrix

Features	ActiveX	HTML Desktop	HTML Tablet
View	X	X	X
Find	X	X	X
Annotate	X	X	X
Publishing	X	X	pdf only
Compare	X	X	
Measure	X	X	
Takeoff	X		
PDF Bookmark	X	X	
Print	X	X	
Doc Merge	X		X

9.X HTML client has reduced subset of Viewer features, as shown. HTML has no text compare tool.



# HTML Features Matrix – Platform Support

Platform	ActiveX	HTML Desktop	HTML Tablet
PC	X	X	
MAC		X	
Browser	X	X	
iPad/Android Tablet			X

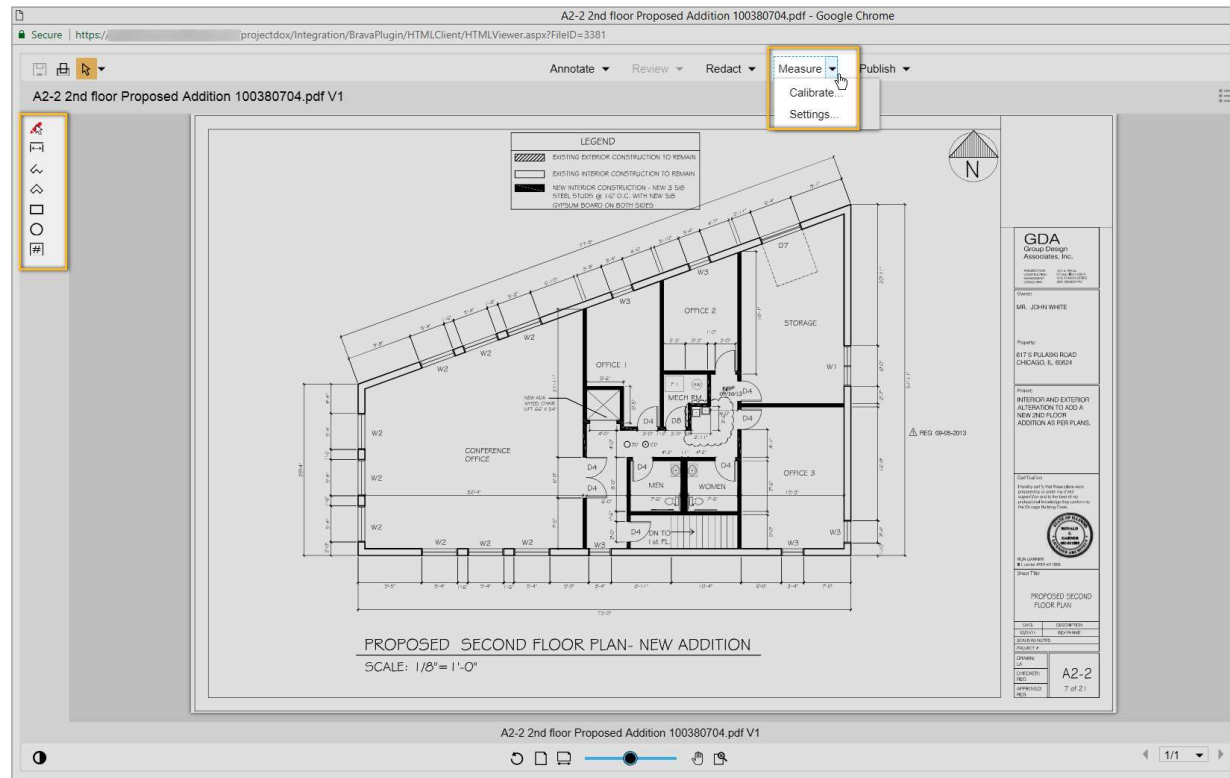
# HTML Features Matrix - Annotation

Annotation Features	ActiveX	HTML Desktop	HTML Tablet
Arrow Pointer	X	X	X
Changemark	X	X	X
Changemark Discussion	X	X	X
Changemark Arrow	X	X	
Changemark Cloud	X	X	
Changemark Highlight	X	X	
Changemark Text Highlight	X	X	
Changemark Strikethrough	X	X	
Crosscut	X	X	X
Ellipse	X	X	X
Highlight	X	X	X
Insert Image	X	X	X
Line	X	X	X
Polygon	X	X	X
Sketch	X	X	X
Polyline	X	X	X
Rectangle	X	X	X

# HTML Features Matrix - Annotation

Annotation Features	ActiveX	HTML Desktop	HTML Tablet
Text	X	X	
Round Rectangle	X	X	
Scratch Out	X	X	
Stamps	X	X	
Edit Text Markups	X	X	
Cloud	X	X	X
Polycloud	X		
Arc	X		
Consolidate Markups	X	X	
Burn in Markups	X	X	to PDF
Electronic Signature	X	X	
CAD Symbol	X	X	
Checkview	X	X	
Bookmark	X	X	
Export to Word		X	

# HTML5 Measuring



# HTML5 Viewer Enhancements – CAD support



Old



New

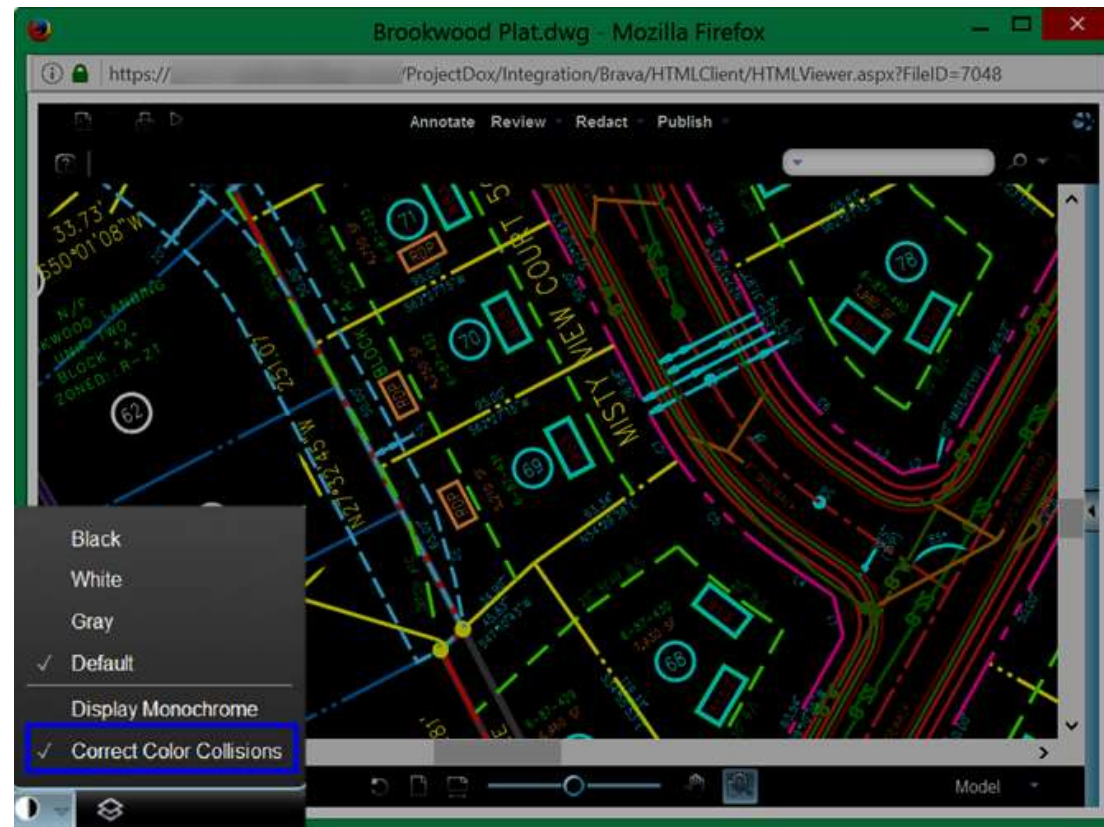
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8.5

Vector-based. Significant improvement in scaling and viewer quality

# HTML5 Viewer Enhancements – Color Correction



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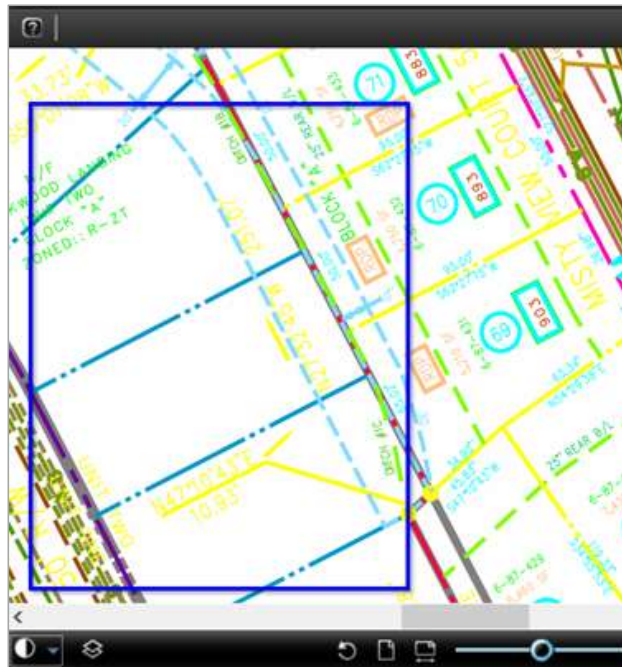
## 8.5

Use this option to toggle whether or not to change (invert) foreground colors so that all elements remain visible when setting colliding background colors.

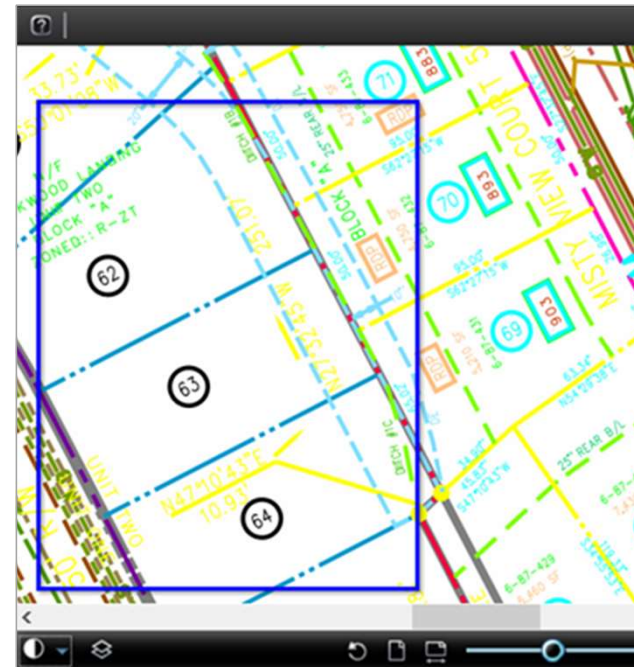


# HTML5 Viewer Enhancements – Color Correction

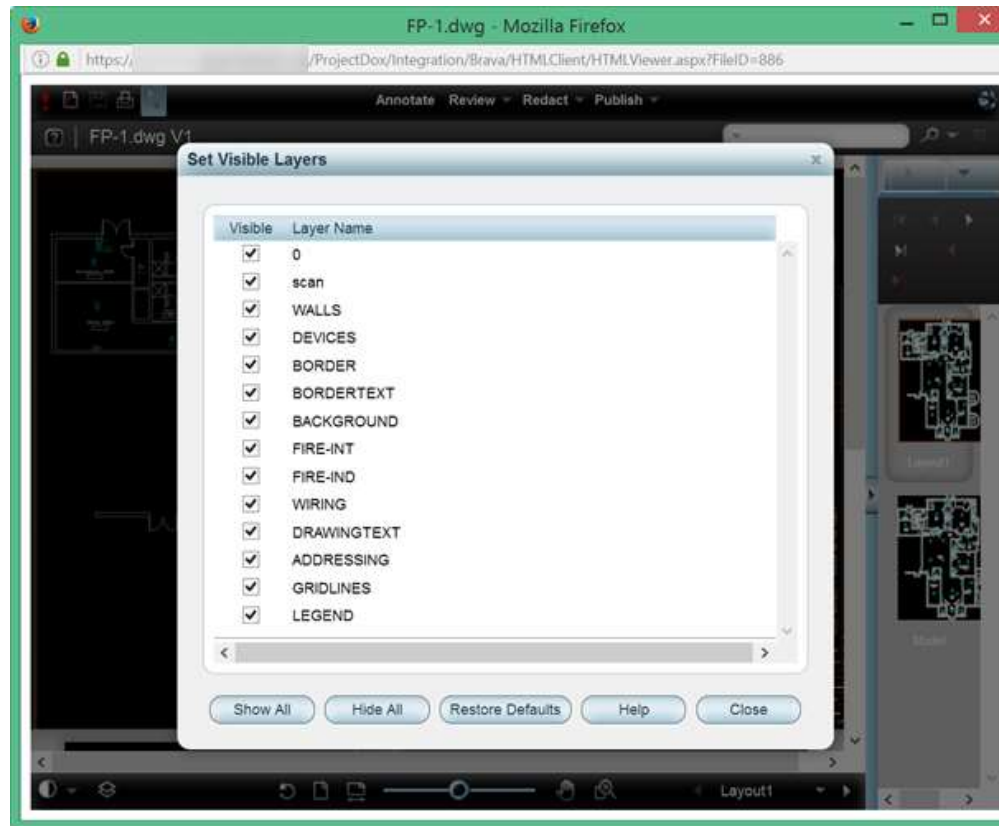
Without Correction



With Correction



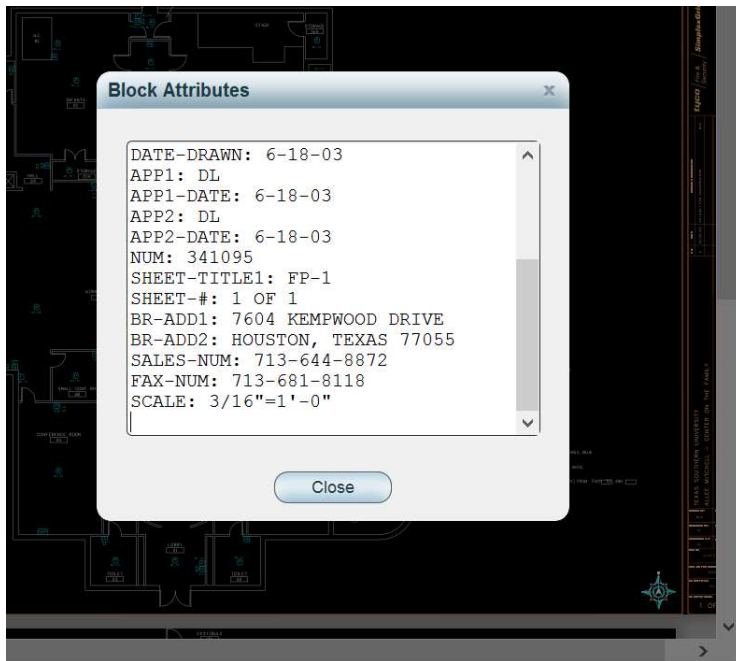
# HTML5 Viewer Enhancements – Layers Support



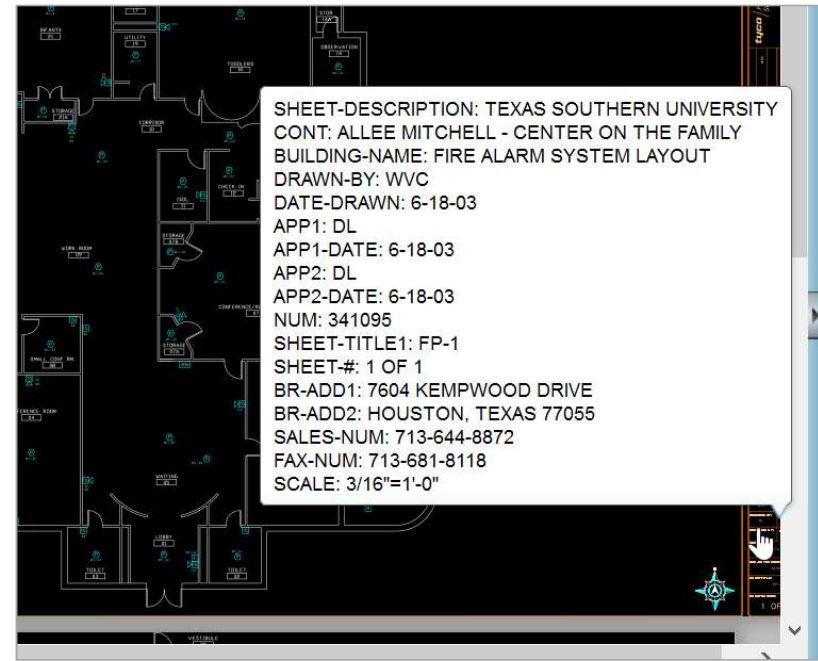
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# HTML5 Viewer Enhancements — Block Attributes & Hotspots

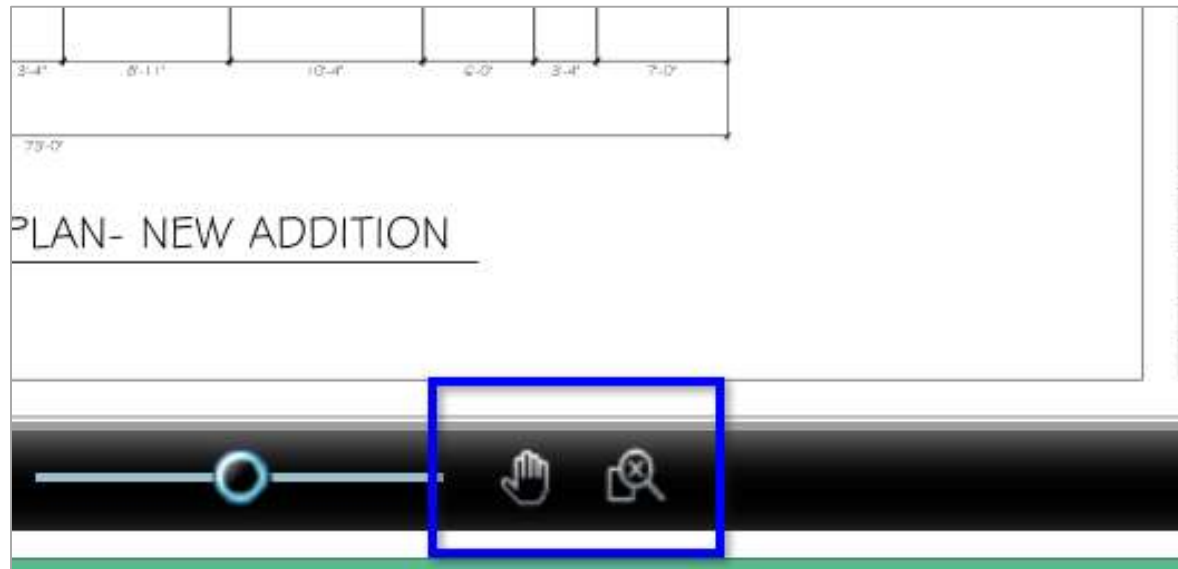


Click on Block Attribute




Hover over Hotspot



# HTML5 Viewer Enhancements — Pan/Zoom & Zoom Window



# WorkFlow

# ProjectFlow – eForm

 **MY PLUMBING REVIEW**

---

**Task Instructions**  
Upon acceptance of task, please review the required drawings and provide any applicable comments and status.

View/Edit Changelog Items (1)

View/Edit Checklist Items (0)

---

**My Review**

**Department:** Plumbing

**Reviewed By:** wt04 Taylor  
wt04@avolvesoftware.com

**Review Status:** [Please select a status] ▼

**Reviewer Comments:**

---

**Request Additional Reviews**

<input type="checkbox"/>	GROUP NAME	REQUESTED BY	REASON REQUESTED
	Electrical Sub group does not contain any users.		

Notify Parent Groups

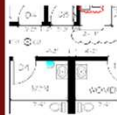
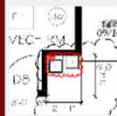
---

Complete Review

Save For Later

Close

# ProjectFlow – Changemark Viewer

Workflow Review Changemark Viewer								
<span>Refresh</span> <span>Save Settings</span> Review Cycle: <span>All</span> Group: <span>Plumbing</span>								
REF #	STATUS	FILE IMAGE	DEPARTMENT	CYCLE	UPDATED...	FILE NAME	MARKUP NAME	CHANGEMARK SUBJECT
▽ Equals...	▽ Contains...		▽ Contains...	▽ Equals...	▽ Contains...	▽ Contains...	▽ Contains...	▽ Contains...
4	Unresolved		Plumbing	1	wt04 Taylor	<a href="#">A2-2 2nd floor Proposed Addition 100380704.pdf</a>	<a href="#">wt04 plumbing</a>	Plumbing 01
5	Unresolved		Plumbing	3	wt04 Taylor	<a href="#">A2-2 2nd floor Proposed Addition 100380704.pdf</a>	<a href="#">wt04 plumbing</a>	Mop Drain
1 - 2 of 2 records								
<span>Save</span> <span>Close</span> <span>View Full Report</span>								

9.x (ProjectFlow). Displays dropdowns for selecting Review Cycle and Group; Columns and links. Changemarks can be viewed but not edited from here.

# ProjectFlow – Changemark Viewer (cont'd)

Show 5 records						
CHANGEMARK SUBJECT	CHANGEMARK DETAILS	CHANGEMARK DATE UPDATED	REVIEWER COMMENTS	COORDINATOR COMMENTS	APPLICANT RESPONSE	ROW DATE UPDATED
Contains...	Contains...	On...	Contains...	Contains...	Contains...	On...
ing 01	What were you sinking? If it's indoors, it needs to be plumbed. The text in for a changemark can be quite lengthy. No need to count characters. On and on and on... If it's indoors, it needs to be plumbed. The text in for a changemark can be quite lengthy. No need to count characters. On and on and on... If it's indoors, it needs to be plumbed. The text in for a changemark can be quite lengthy. No need to count characters. On and on and on... If it's indoors, it needs to be plumbed. The text in for a changemark can be quite lengthy. No need to count characters. On and on and on...	6/12/2019 9:34:10 am				6/10/2019 3:07:48 pm
Drain	If it's indoors, it needs to be plumbed. The text in for a changemark can be quite lengthy. No need to count characters. On and on and on... If it's indoors, it needs to be plumbed. The text in for a changemark can be quite lengthy. No need to count characters. On and on and on...	6/12/2019 9:34:11 am				6/12/2019 9:34:34 am

9.x (ProjectFlow). The rest of the columns. Your Reviewer Comments can be added and edited – usually on subsequent cycles.

# ProjectFlow – Checklist Viewer

**Workflow Review Checklist Item Viewer**

[Refresh](#) Comment Type: Plan Review

**Available Checklist Items for Review Cycle #3**

[Save Settings](#)

Show 50 records

<input type="checkbox"/>	PERMIT TYPE	COMMENT TYPE	COMMENT TEXT
<input type="checkbox"/>	Commercial Building Permit	Plan Review	This is a plumbing checklist item. Woo Hoo.

1 - 1 of 1 records

[Add Checklist Items](#)

**Selected Checklist Items for Review Cycle #2**

Review Cycle: 2 [Save Settings](#)

Show 50 records

REF #	PERMIT TYPE	DEPARTMENT	COMMENT TYPE	CYCLE	COMMENT TEXT	APPLICANT RESPONSE	COORDINATOR COMMENTS
3	Commercial Building Permit	Mechanical	DUCT	2	DUCT SIZES INSUFFICIENT: Duct sizes and/or quantities are insufficient for the following rooms:		

1 - 1 of 1 records

[Save](#) [Close](#) [View Full Report](#)

More

9.x (ProjectFlow). Checklist items can be added/edited for your group in current cycle, and viewed for all groups. Control for selecting cycle(s) to view.

# ProjectFlow – Checklist Viewer (cont'd)

**Workflow Review Checklist Item Viewer**

[Refresh](#) Comment Type: Plan Review

**Available Checklist Items for Review Cycle #3**

[Save Settings](#)

Show 50 records

<input type="checkbox"/>	PERMIT TYPE	COMMENT TYPE	COMMENT TEXT
	Contains...	Contains...	Contains...
<input type="checkbox"/>	Commercial Building Permit	Plan Review	This is a plumbing checklist item. Woo Hoo.

1 - 1 of 1 records

[Add Checklist Items](#)

**Selected Checklist Items for Review Cycle #2**

Review Cycle: 2 [Save Settings](#)

Show 50 records

T	APPLICANT RESPONSE	COORDINATOR COMMENTS	DATE UPDATED	STATUS	STATUS UPDATED BY	STATUS DATE UPDATED
	Contains...	Contains...	Contains...	Contains...	Contains...	Contains...
	INSUFFICIENT; Duct sizes as are insufficient for rooms.		6/10/2019 5:34:39 PM	Not Met	Wally Taylor	6/10/2019 5:34:39 PM

1 - 1 of 1 records



[Save](#) [Close](#) [View Full Report](#)

20190612-1016






# ProjectFlow – Workflow Designer

**Task List**


 Refresh  Save Settings

☐ Show all tasks for all users

OPTIONS	TASK	PROJECT	INSTAN...	GROU
	Contains...	Contains...	Contains...	Co
  	<a href="#">Screen Review Task</a>	BU-2018-001	MaWa	Review Coord

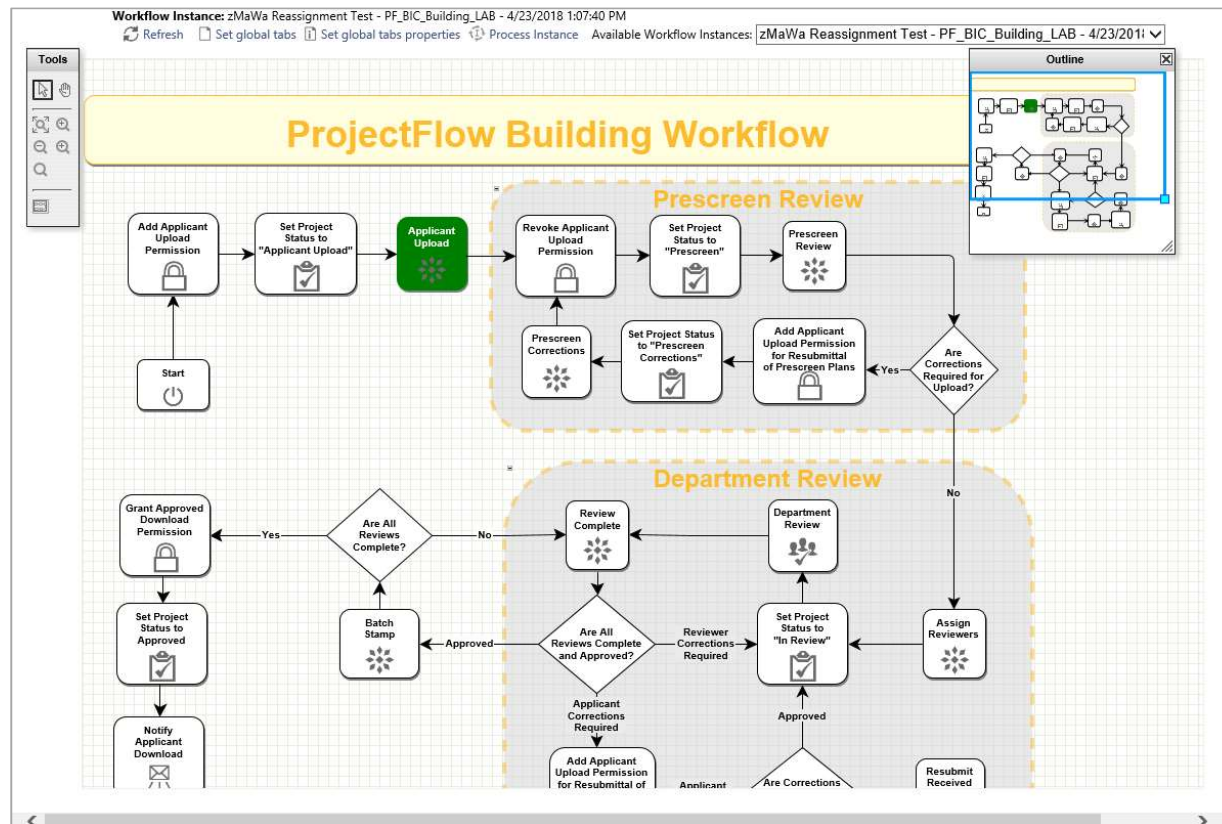
1 - 1 of 1 records

**Workflow Instances**

	NAME	COORDINATOR GROUP	STATE
	MaWa	Review Coordinator	Active

1 - 1 of 1 records


# ProjectFlow – Workflow Designer



# Improved Applicant Experience

# New Applicant User Experience

ProjectFlow  
BUILDING




---



**Task Instructions**  
Select appropriate destination folder then select files to upload to selected folder. Repeat until all required submission files are uploaded.  
TO START REVIEW PROCESS: Please select "Upload Complete - Notify Jurisdiction" enabled by first selecting checkbox "Upload Task Complete". (bottom of page)

**Project: BU-2018-002**

Select destination folder for files:

▼

 BU-2018-002

-  Drawings
-  Documents

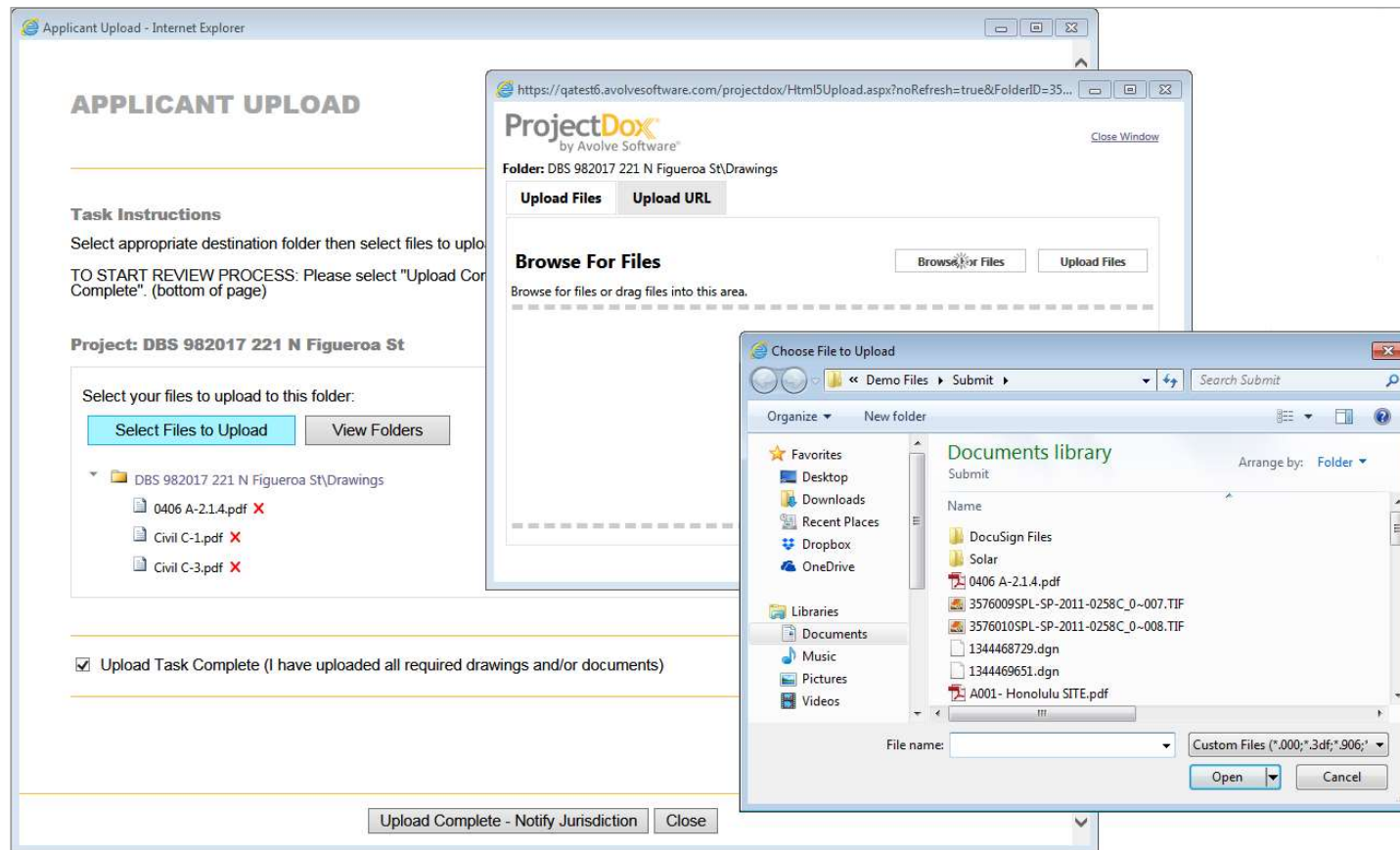
☐ Upload Task Complete (I have uploaded all required drawings and/or documents)

Upload Complete - Notify Jurisdiction

Close

9.X The feature does require configuration by Avolve. Applicant can upload files directly from the eForm in a single step. The system provides email confirmation of uploads and task completions. Jurisdictions can edit this confirmation email to add “next steps” notification to the applicant.

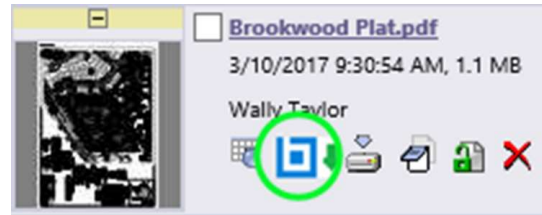
# New Applicant User Experience



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# Additional Features

# Bluebeam Revu® Integration



Plan reviewers can now use their license of Bluebeam Revu®:

1. View and markup PDF files from ProjectDox.
  2. “Check-in” marked up PDFs into ProjectDox to securely manage as new versions.
  3. ProjectDox attaches the marked-up PDF file to the workflow task “Changemark List” for easy access by the Applicant.
- Both Revu and ProjectDox’s Brava viewers can be used together in the solution.

# Bluebeam Revu® Integration

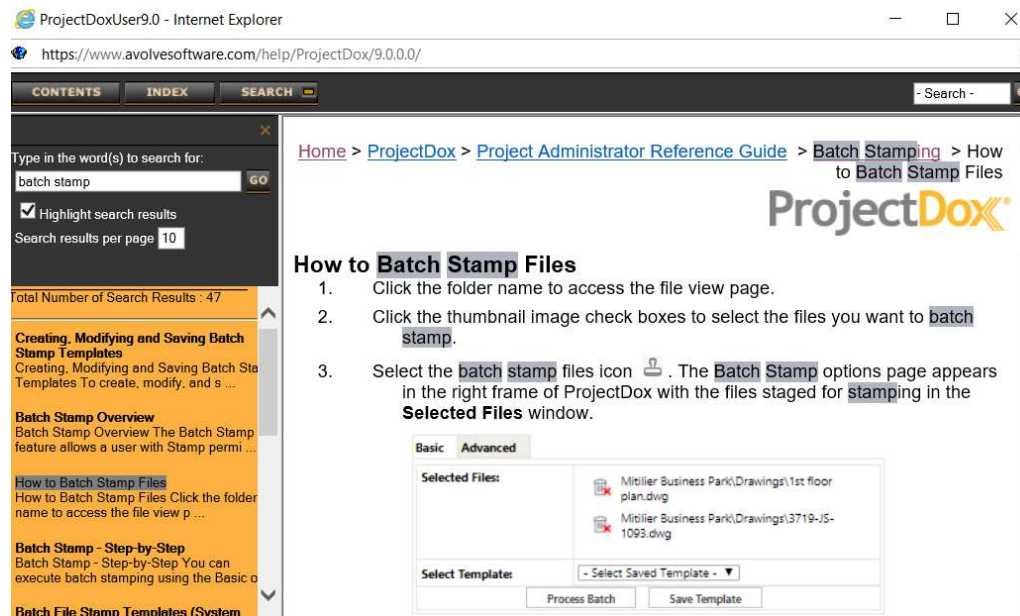


See the Online Help for additional information.

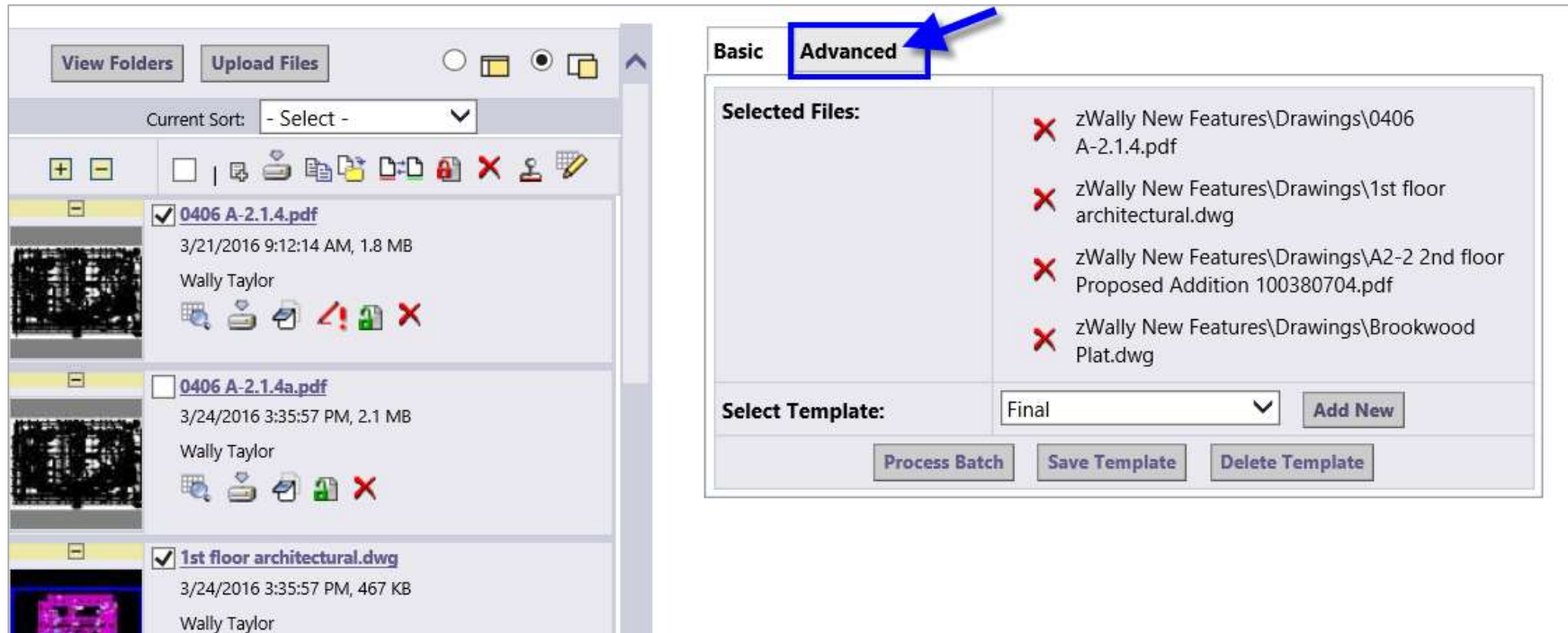


# Batch Stamping Enhancements

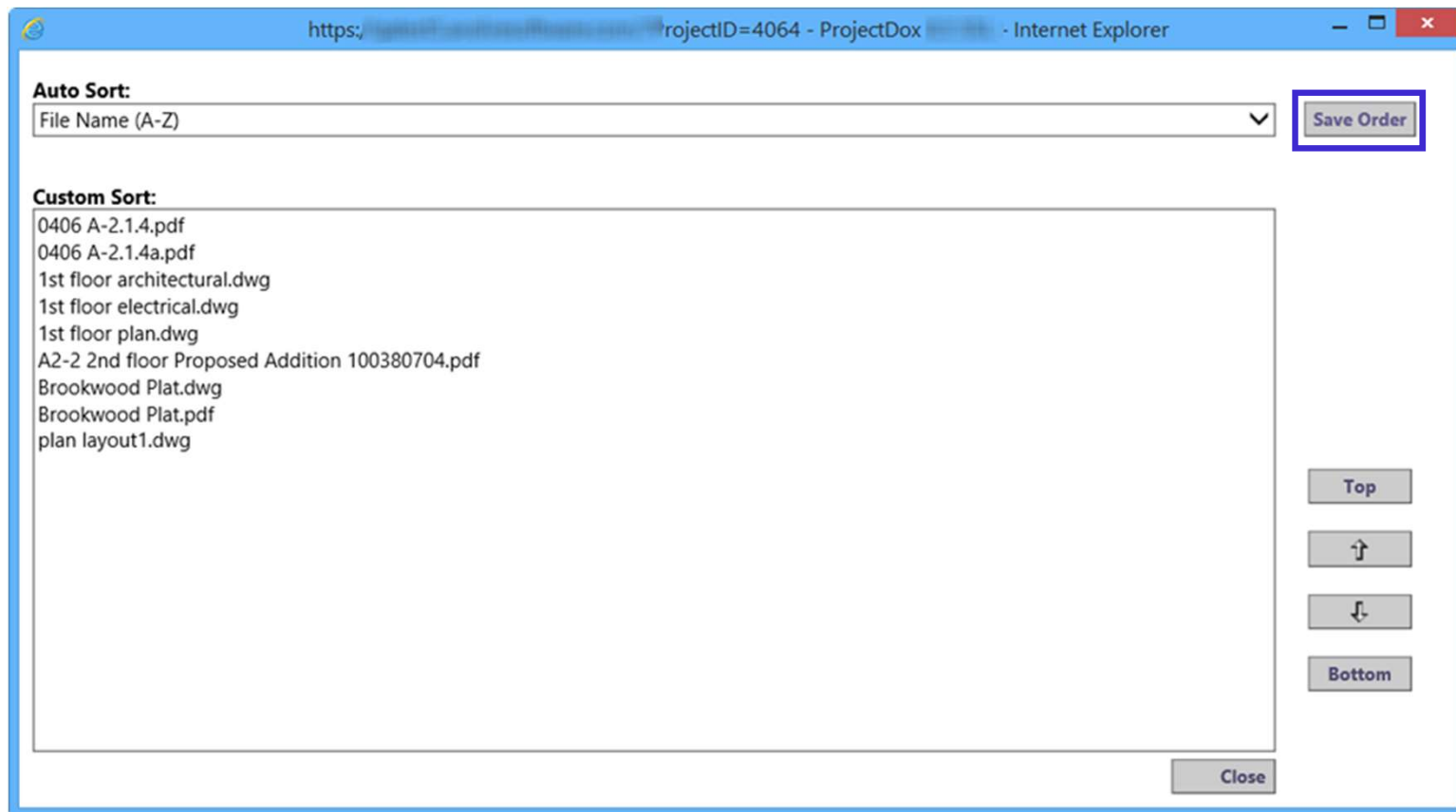
- You can now batch stamp or publish across folders of a project as well as across projects. See ProjectDox online help for details:



# New Stamping Feature – Merge Files



# New Stamping Feature – Merge Files



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## 8.6

From the Advanced Tab, select Merge Documents – Yes

Complete the Merged Document File Name

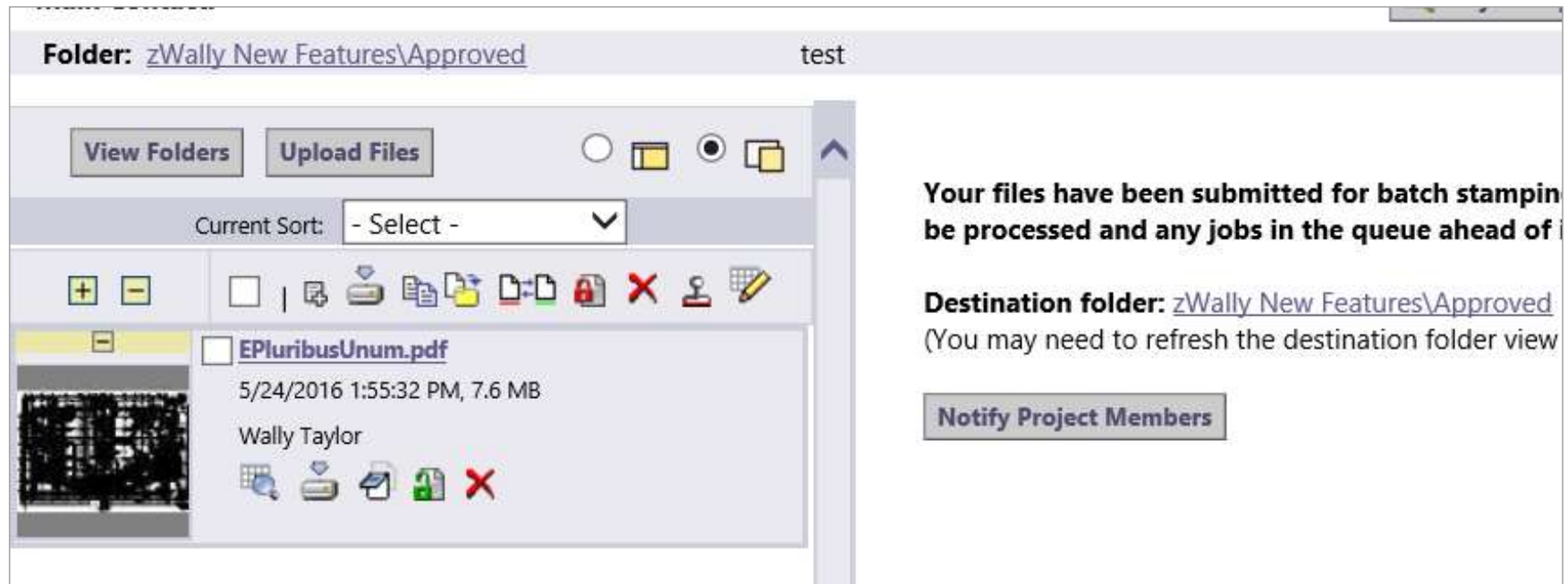
Optional – Select Merged Order, to arrange the file order in the resulting merge, and click Save Order

**NOTE:** the configuration for which pages to stamp will treat the merged file as a single file.

# New Stamping Feature – Merge Files

Basic	Advanced
<b>Selected Files:</b>	<div>✗ zWally New Features\Drawings\0406 A-2.1.4.pdf</div>
<b>Burn in Markups:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Inherit Metadata:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Where to place Stamp:</b>	Bottom Center ▼
<b>Pages to Stamp:</b>	All ▼
<b>Select Stamp:</b>	Final ▼
	<div>Process Batch Save Template Delete Template</div>
<b>Output File Type:</b>	pdf ▼
<b>Destination</b>	Approved

# New Stamping Feature – Merge Files



The screenshot displays the Avolve software interface for a folder named "zWally New Features\Approved". The interface includes a "View Folders" button, an "Upload Files" button, and a "Current Sort" dropdown menu set to "- Select -". Below these, there is a toolbar with various icons for file management. A file named "EPluribusUnum.pdf" is shown with a thumbnail image, a date of "5/24/2016 1:55:32 PM", a size of "7.6 MB", and the name "Wally Taylor". To the right of the file list, a message states: "Your files have been submitted for batch stamping and will be processed and any jobs in the queue ahead of it." Below this message, the "Destination folder" is listed as "zWally New Features\Approved" with a note: "(You may need to refresh the destination folder view)". A "Notify Project Members" button is also present.

**Folder:** [zWally New Features\Approved](#) test

**View Folders** **Upload Files**

Current Sort: - Select -

**EPluribusUnum.pdf**  
5/24/2016 1:55:32 PM, 7.6 MB  
Wally Taylor

**Your files have been submitted for batch stamping and will be processed and any jobs in the queue ahead of it.**

**Destination folder:** [zWally New Features\Approved](#)  
(You may need to refresh the destination folder view)

**Notify Project Members**

# Performance Enhancements

- Improved response for HTML5 publishing and viewing
- Database tuning. Improved response for:
  - Projects query
  - Stamp templates
  - Viewing projects folders and files



# Questions?

## Thank you for attending.